DOCUMENT RESUME

ED 059 546 24 EA 004 090

AUTHOR Earhart, J. Troy
TITLE Project for Developing Program Planning-Budgeting-Evaluation System. Final Report.
INSTITUTION Dade County Board of Public Instruction, Miami, Fla.
SPONS AGENCY National Center for Educational Research and Development (DHEW/OE), Washington, D.C.
BUREAU NO BR-8-0289
PUB DATE Jul 71
GRANT OEG-0-8-080289-2958(010)
NOTE 277p.

EDRS PRICE MF-$0.65 HC-$9.87
DESCRIPTORS Administrative Personnel; Budgeting; *Educational Administration; Evaluation; Planning; Program Budgeting; *Program Design; Program Development; Programing; *Program Planning; Systems Approach
IDENTIFIERS Dade County Public Schools; Florida; *Planning Programming Budgeting Systems; PPBS

ABSTRACT

The materials in the document report on the development of a program planning budgeting evaluating system in the Dade County, Florida, public schools. Materials cover the development and design of the system from its inception and implementation in the winter and spring of 1971. The project chronology and the program structure and the management practices in program planning and budgeting developed for the Dade County PPBS application are presented. Seven appendixes present a variety of related materials. (RA)

ED 059546

PA 24

BR 8-0289 OE-BR
EA

FINAL REPORT

OE Bureau of Research No. 8-0289
Grant No. OEG-0-8-080289-2958 (010)

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
OFFICE OF EDUCATION
THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL OFFICE OF EDUCATION POSITION OR POLICY

J. Troy Earhart
The Board of Public Instruction of Dade County
Administration Offices
1410 N. E. Second Avenue
Miami, Florida 33132

PROJECT FOR DEVELOPING PROGRAM PLANNING-BUDGETING-EVALUATION SYSTEM

July 1971

U.S. DEPARTMENT OF HEALTH, EDUCATION AND WELFARE

Office of Education

National Center for Educational Research and Development

EA 004 090

ABSTRACT

On September 13, 1967, the Board of Public Instruction of Dade County, Florida, and the Research Corporation of the Association of School Business Officials transmitted a joint proposal to the United States Office of Education for a three year project to develop the design for a Program Planning-Budgeting-Evaluating System (PPBES). During the 1968-69 and 1969-70 fiscal years, a project staff was formed and development efforts and pilot activities were undertaken which resulted in the production of various pilot products such as program plans, objectives and evaluative criteria for certain programs and a demonstration Program Budget for Fiscal Year 1970-71.

As a result of the developmental efforts the project staff was established as the Office of Program Planning and Budgeting during fiscal year 1970-71 and proceeded to incorporate PPBES procedures into the planning and budgeting practices of Dade County Schools. A major accomplishment was the revision of the Budget Manual to the Planning and Budgeting Manual which includes the schedule, forms and guidelines governing the program planning and budgeting cycle as well as descriptions of operational and summary planning documents produced. The culmination of the cycle was the Program Memoranda for Fiscal Year 1971-72.

FINAL REPORT

OE Bureau of Research No. 8-2389
Grant No. OEG-0-8-080289-2958 (010)

PROJECT FOR DEVELOPING PROGRAM PLANNING-BUDGETING-EVALUATION SYSTEM

J. Troy Earhart

The Board of Public Instruction of Dade County

Miami, Florida

July 1971

The research reported herein was performed pursuant to a Grant No. OEG-0-8-080289-2958 (010) with the Office of Education, U.S. Department of Health, Education and Welfare. Contractors undertaking such projects under Government sponsorship are encouraged to express freely their professional judgment in the conduct of the project. Points of view or opinions do not, therefore, necessarily represent official Office of Education position or policy.

U.S. DEPARTMENT OF
HEALTH, EDUCATION, AND WELFARE

Office of Education

National Center for Educational Research and Development

TABLE OF CONTENTS

		Page
I.	Introduction	1
II.	Project Procedures	3
III.	Results - Dade County PPBES Operational Components .	31
IV.	Conclusions.	115
Appendix A -	Personnel Division Program Memoranda, 1970-71 Physical Plant Division Program Memoranda, 1970-71	117
Appendix B -	Personnel Division Program Report Physical Plant Division Program Report . . .	153
Appendix C -	Exceptional Child Objectives/Indicators By Subprogram (Area of Exceptionality)	181
Appendix D -	Exploring the Application of Program Planning, Budgeting, Evaluating Methodology at the School Level: A Report on a Teacher Seminar	211
Appendix E -	The Bilingual Program Section of Program Memoranda for Fiscal Year 1971-72 . .	245
Appendix F -	Sample Budget Printout--Bilingual Program . .	253
Appendix G -	The Northwest District Office Section of Program Plans: District Programs 1971-72 . .	257

CHAPTER I

INTRODUCTION

On September 13, 1967, the Board of Public Instruction of Dade County, Florida, and the Research Corporation of the Association of School Business Officials jointly transmitted a proposal for a three year project to develop the design for an integrated system of program planning-budgeting-evaluating for local school districts. As delineated in the proposal, the responsibilities of the respective agencies were projected as follows:

Research Corporation of the Association of School Business Officials:

1. Survey and analysis of program budget developments in related studies and projects.

2. Formulation of a conceptual model for program planning-budgeting-evaluating for local school districts.

3. Publication and dissemination of project results among local school districts.

Dade County Public Schools:

1. Development of a design for program planning-budgeting-evaluating for the Dade County School System.

2. Implementation of the program planning-budgeting-evaluating system.

The responsibilities of Dade County Public Schools were amplified in the body of the proposal to include a three phase approach: initial design, limited implementation, and refinement and expansion of the installation. The initial design and implementation phases were expected to extend over the first two years of the project. The design phase was anticipated to include the development of a rationale and criteria for the selection of a program structure, a first phase program structure developed from that design, and a description and specifications for the operational components of the system. Products developed during the design phase of the project are included in Chapter II. It should be noted that components of the system developed early in the project have been considerably modified in the course of implementation. These early products represent the starting point for the system and not the actual design which has emerged from the project.

During the preliminary phase of the project, a program accounting experiment was conducted in three schools, the development of program plans with subsequent evaluation was piloted in the Personnel and Physical Plant Divisions, and the use of PPBES at the school level was simulated in a teacher seminar. These developmental products are included in Appendixes.

During the last year of the project, early design and pilot efforts were modified in preparation for widespread installation of the system. Procedures and forms were developed for program budgeting and accounting in all responsibility centers of the school system. Procedures and forms were developed also for program planning with the potential for evaluation at all support responsibility centers (37 administrative units). These were incorporated into the existing Budget Manual whose title was revised to Planning and Budgeting Manual. As described in the manual, plans developed during the budget cycle were used both during the administrative phase of the cycle as well as summarized in a public budget document, Program Memoranda for Fiscal Year 1971-72, for use in public budget hearings. It is felt that the system as designed in the Planning and Budgeting Manual is suitable for expansion and refinement in subsequent years. Sections of the manual which primarily deal with PPBES are included within Chapter III.

Chapter II-the procedures utilized in project development-includes a case study with particular focus on the reactions of the organization to the developing system and the effect which such reactions had on the system. This case study has been included within the document which the Research Corporation of the Association of School Business Officials will publish in the fall of 1971.

Appendixes other than those already mentioned include objectives and evaluative measures (indicators) which were developed during the first year installation of the PPBE System, samples of the budget printouts, and a special program section of the Program Memoranda. School districts in the initial phases of a PPBE System may find these useful.

CHAPTER II

PROJECT PROCEDURES

As previously mentioned the Research Corporation of the Association of School Business Officials scheduled for the fall of 1971 the publication of a comprehensive report for the three year project. One appendix to that report is The Introduction of PPBES Methodology in a Large School District: Dade County Schools. That appendix describes the procedures followed and the developmental strategies employed in the Dade County effort; accordingly, this chapter consists of that appendix with minor modifications.

During fiscal year 1970-71 program planning and budgeting procedures were implemented in the Dade County Public Schools. The 1971-72 fiscal year budget, operational plans and summary plans were prepared using those procedures which are now established as an integral part of the management practices of the school system. Planned developments for 1971-72 include efforts to install program accounting and program evaluation techniques. The framework for these developments has been established.

The school system provided educational programs for approximately 240,000 children (sixth largest in the nation) with a total budget of $250,000,000 in 1970-71. Over the past few years a responsibility center concept of administration has evolved with the predominant responsibility center types being schools, district offices* and system-wide support centers.

Project Chronology

It is somewhat difficult to identify with precision those management needs which were not being met by existing management information or practices and which led to the decision to explore the utility of PPBES. The following is presented as a chronology of those events which seemed to have direct relevance to the establishment of a PPBES project staff charged with the responsibility of designing an operational PPBE System for Dade County Schools. Subsequent events considered significant in the development are also included.

Spring, 1964: as part of the preparation of the 1964-65 budget, a system of cost center budgeting was inaugurated.

1964-65: the cost center budgeting concept was further developed and continued; initial steps were taken to begin accounting for expenditures on a cost center basis (instructional materials only).

*The school system is decentralized administratively into six geographic areas each administered by a district superintendent responsible to the county superintendent who in turn is responsible to the School Board.

Fall, 1965: Congress passed PL 89-10. The school system secured a series of grants under the legislation and established financial processing techniques which in essence was a program budgeting/accounting system for federally contracted programs.

1965-66: the Superintendent of Schools and various administrators began a series of discussions relative to the need for more effective management techniques including the possible utility of program budgeting. Initial steps were taken during the spring and summer of 1966 to prepare a formal proposal for program budgeting to submit for federal funding.

September, 1966: a management consulting firm was employed to design an improved financial reporting system.

October, 1966: a comprehensive program budget research proposal was transmitted to the U.S. Office of Education with a request for federal funding. This proposal was not funded.

Fall, 1966: various school system administrators began making contacts with agencies and individuals across the nation who were active or interested in program budgeting. These included extensive contacts with the Department of Management in the School of Business Administration at the University of Miami.

February 16, 17, 1967: the Government Research Council of the Dade County Chamber of Commerce sponsored for the School Board and school system administrators a conference on tools for effective management. Numerous references to program budgeting were made at this conference.

September 13, 1967: the Dade County Board of Public Instruction and the Research Corporation of the Association of School Business Officials, as cooperating agencies, transmitted a proposal to USOE for a research grant to design a Program Planning, Budgeting, Evaluating System. This proposal was funded.

September 12, 1968: the first staff member (project director) of the PPBES project was employed.

September - December, 1968: a resource committee was formed to work with the project director in establishing general directions for PPBES development. Toward this end this committee held lengthy meetings on a half dozen occasions between September 26, 1968 and December 3, 1968. The committee was composed of the following administrators:

Superintendent of Schools
Assistant Superintendent for Administrative Services
Associate Superintendent for Instruction
Assistant Superintendent for Finance
District Superintendent - Northeast District
Director of Special Programs
Director of Data Processing
Director of Program Budgeting
Administrative Assistant to the District Superintendent - Vocational District
Coordinator of Inservice Education

February, 1969: the first program structure was developed (page 13).

July 1, 1969: the PPBES project staff that eventually developed the system design and was responsible for the initial implementation was formed.

January, 1970: based on an analysis of the first program structure and reactions received from administrators and teachers the second program structure was developed (page 15).

February, 1970: with the second program structure as the framework and using manual crosswalk procedures a Tentative Program Budget for Fiscal Year 1969-70 was produced.

July, 1970: additional analyses resulted in a revised program structure.

August, 1970: Program Budget for Fiscal Year 1970-71, the first official program budget for Dade County Public Schools, was published.

February, 1971: the Planning and Budgeting Manual, replacing the Budget Manual, a manual governing program planning and budgeting practices in Dade County Schools was published.

February, 1971-- July, 1971: PPBES procedures were implemented in Dade County Schools in the preparation of the 1971-72 proposed budget.

July, 1971: Program Memoranda for Fiscal Year 1971-72, a comprehensive program budget document was produced.

Determination of a Starting Point

Initial efforts of the project staff were based on the answers to three questions. (1) What information was available about PPBES in general and specifically about the application of PPBES

methodology to educational institutions? (2) What were the current scope and administrative location of planning, budgeting and evaluating activities? (3) What types of PPBES activities and documents were potentially useful in the management of a large school district?

Some literature had become available relating governmental attempts to install program budgeting. There was a paucity of information, however, concerning the applicability of PPBES to management practices in school districts and very few school districts had attempted or even considered PPBES as a management tool. The Research Corporation of the Association of School Business Officials was concurrently developing a conceptual model for PPBES that would be appropriate for school districts. Unfortunately, this model was under development and therefore not available at that time.

Early in 1969 a survey was conducted which identified all documents being used for planning, budgeting, and evaluating purposes in the school system. This survey clearly indicated that a wide diversity of techniques and documentation was currently employed by various administrators.

It was determined that potentially useful activities in existing governmental applications of PPBES were, simply stated, program planning, program budgeting, program evaluation, and program analysis. Resulting documentation was found in program plans, program memoranda, program budgets and issue papers. This is, of course, an inadequate reference to those activities and documents. The point to be emphasized is that in PPBES those activities are integrated and those documents are interrelated; and that in PPBES, the program is the integrating unit for those activities and documents. Potential PPBES activities and documents were compared with existing planning, budgeting, and evaluating activities and documents. As a result, areas of need which could be served by PPBES were identified. "Evolution" was the dominating characteristic of this approach in that it entailed (1) the identification of existing activities/documents, (2) the design of desirable activities/documents, and (3) working to move from the existing activities/documents to desired ones.

Strategies for Development

Certain overriding principles dictated adoption (planned or accidental) of those strategies employed in developmental efforts. These were (1) the PPBE System was to be an evolving one, initially from existing practices and subsequently in refinement stages, (2) tasks selected in the developmental sequence were to be carefully chosen so that they could be readily achieved, so that implications for immediate change in the organization would be minimized, and so that the imposition on persons and/or the organization would be minimal, and (3) that requests for persons in the organization to exhibit certain behaviors (e.g., writing

objectives) would not be made until a reasonable probability existed that those persons possessed those behaviors. This latter principle required that the PPBES staff provide numerous orientation/inservice training sessions. Accordingly, the staff undertook certain kinds of pilot activities and sought certain types of pilot products. These were:

- Pilot activities and documents which did not differ substantially from existing activities and documents

- Pilot products which capitalized on the advantages of current activities and documents but offered those benefits of PPBE methodology which could be accrued in the start-up phase

- Pilot products which offered minimal risk of failure and maximal benefits (e.g., applying evaluation first to administrative and industrial type operations instead of first to instruction)

- Pilot products which had usefulness in themselves and contributed to an evolutionary implementation of the system.

Relative to the involvement of other personnel the following guidelines were adopted:

- To maximally involve other line and staff personnel in the system development with the PPBES staff providing the structures, guidelines, and format for such development.

- To involve other line and staff personnel only after adequate training/orientation had been provided.

The Key Role of the Program Structure

Although the resource committee was unsuccessful in its attempt to produce a program structure the direction was set for initial PPBES development, i.e., the first task was to establish a program structure which would provide the framework for future development. The project staff proceeded from this point in attempting to define a logical system for classifying the diverse activities of the school district.

The inductive approach was adopted in an attempt to classify existing activities in a program structure. The rationale for this approach was based on the following assumptions:

- The activities of the past and present do have relevance to the mission of an educational organization

- The inductive approach affords a reasonable probability for successful implementation of PPBES

- The implementation of PPBES (possibly most innovations) should be evolutionary in nature

- The collection of information pertaining to and the assessment of existing programs are beneficial.

However, the danger of being committed to the status quo is inherent in the inductive approach. It was recognized that the PPBES design must include the capability to accommodate change when the need for change is well documented.

The rationale for the first program structure (page 13) was developed by the PPBES project staff. Division of Instruction* personnel used that structure to produce a manual of Dade County Public Schools Programs and initiated various planning activities based on that structure. The utility of program structure oriented "thinking" was substantiated. The weakness of the structure was primarily one of communication. Although the structure could accommodate the different levels of activities, i.e., elementary, junior high, senior high, that fact was not readily communicated. Although the structure could lead to greater detail in the support programs, such detail was not provided. Additionally, a concept based on and presented with "formal logic" was somewhat alien to school system personnel.

Accordingly, the project staff revised the program structure. The logic and the concomitant definitions were refined with the result that the structure was transformed into a "benefit oriented" model of the school system which included two program areas--Instruction and Administration/Planning (page 15).

Formal presentations of this structure were made to groups of personnel which included representatives of each administrative office, instructional personnel such as teachers and subject area consultants, principals, and executive level administrators. Certain revisions were made in the structure based on interactions at those presentations. The structure then provided the framework for producing a program budget for fiscal year 1969-70 using manual crosswalk procedures. As a result of the formal presentations of the structure and using the structure in pilot activities, conclusions were drawn which indicated the need for further "revisions" in the structure. These were (1) the structure presented an unnatural dichotomy between instructional and support activities, (2) the structure was too much a reflection of responsibility centers and did not adequately portray programs as they crossed organizational lines and (3) the structure did not yield the capacity for analyzing the school system's activities

*The Division of Instruction is comprised of instructional support personnel, e.g., teachers on special assignment and subject area specialists, who have responsibilities for curriculum planning, staff development, educational media, pupil personnel services and program evaluation.

from a perspective of major educational objectives or priority thrusts.

The program structure that finally evolved (page 22) and was used in the first phase implementation of the system has two dimensions--a program dimension and a responsibility center dimension. Present activities of the organization are readily communicated, using this structure, in terms quite familiar to organization personnel; classification of activities conducted through various offices but having common objectives can be accommodated. This structure provided the framework for the preparation of plans and budget requests for the 1971-72 fiscal year. The principal thrusts of those activities were program planning and program budgeting at responsibility centers; this was accomplished using three appropriation channels--basic, new and supplemental.

- Basic budget requests accompany plans to continue the on going program activities

- New budget requests accompany plans for an increase in the basic and become part of the basic if granted

- Supplemental budget requests accompany plans for "project" like activities and when granted are for one year only.

The program structure assumed a key role as it provided the starting point in the PPBES development and formed the framework for that development and subsequent implementation. Representing a model of the educational organization, the development of the structure necessarily involved persons who were to use the structure.

The Commitment to Change

A major danger in employing the inductive approach to developing the program structure is that of becoming "locked in on the status quo," i.e., the structure reflects current activities and cannot be changed. The Dade County Schools does indeed have a commitment to change and the PPBE System design includes two powerful vehicles to accommodate change--the Special Programs category and the supplenental appropriation channel. Special Programs include programs designed to meet the needs of particular target populations, e.g., Exceptional Child Program; Drug Abuse Program (established for 1970-71), and those designed to meet high priority needs, e.g., Desegregation (established for 1971-72). The one year supplemental appropriation channel (supplementals may be renewed but only on an annual basis) allows experimentation with activities and techniques that may eventually be adopted in the system. The program structure must be dynamic, must facilitate change.

Pilot Activities and Products, 1969-70

Consistant with the strategies outlined in Section IV certain decisions were made with respect to piloting PPBES processes. These were (1) to obtain volunteers if possible to serve as pilots, (2) to pilot, in the main, in support programs, (3) to involve administrators prior to involving teachers instead of vice versa as is usually the case in major innovations and (4) to proceed on a system-wide basis and work "down" instead of starting at the grass roots and working "up".

The assistant superintendents for Physical Plant and Personnel volunteered as PPBES pilots with pilot activities and products to be undertaken with respect to the Personnel Services and Facilities Support Programs.

In each administrative office a person was designated to serve as liaison to the PPBES staff. These liaison personnel were provided special training in PPBES methodology by the project staff as well as through attendance at PPBES Seminars conducted by government agencies. In effect these persons were "PPBES staff" members in the administrative departments. Their primary responsibility was to work with personnel in their departments using the PPBES project staff members as a resource.

Generally, in piloting activities and preparing demonstration products the following procedures were utilized.

- The PPBES staff designed the processes and the products
- These processes and products were discussed with the liaison person in the appropriate department
- The project staff planned and conducted training sessions for personnel in the departments
- The liaison person assumed the responsibility for seeing that the processes were carried out and the products prepared
- The PPBES staff served as consultants to the pilots in an "on call" basis
- The PPBES staff analyzed the products and suggested changes
- The pilot departments considered those recommendations and incorporated those changes they felt to be desirable.

The major demonstration products resulting from pilot efforts were:

Personnel Division Program Memorandum, 1970-71, (Appendix A)[1]

Physical Plant Division Program Memorandum, 1970-71, (Appendix A)[1]

Personnel Division Program Report, (Appendix B)[2]

Physical Plant Division Program Report, (Appendix B)[2]

Exceptional Child Objectives/Indicators by Sub-program (Area of Exceptionality), (Appendix C)[3]

Exploring the Application of Program Planning, Budgeting, Evaluating Methodology at the School Level: A Report on a Teacher Seminar, (Appendix D)[4]

Program Budget for Fiscal Year 1970-71[5]

Subsequently, in the design of system procedures, the knowledge gleaned from pilot efforts was used extensively by the PPBES staff.

Operational Activities and Products, 1970-71

The PPBES project staff and the existing budget section were amalgamated into a Department of Planning and Budgeting located within the Division of Finance. This department will be headed by a Director of Planning and Budgeting, a position which replaces the former position of Budget Director of Dade County Schools. One section in this department will assume the responsibility for maintaining and continuing the PPBES development began through the efforts of the project staff. The formation and organization of this department was further evidence of the commitment to PPBES made by Dade County Schools.

[1]Program plans for 1970-71; includes review of 1969-70 operations, 1970-71 plans, objectives, indicators and budget.

[2]Program summary for the period July 1, 1970 - December 31, 1970, includes narrative summary and indicator data.

[3]Produced as a result of a one day seminar on PPBES conducted June 6, 1970, for Exceptional Child teachers and support personnel.

[4]Produced as a result of a one week seminar on PPBES conducted June 22 - 26, 1970, for selected teachers in Regular Programs.

[5]Produced using manual crosswalk procedures.

The establishment of the Planning and Budgeting Calendar, which delineated the timetable for the preparation of the 1971-72 budget and planning documents (page 29) and which replaced the budget calendar in the existing system, was a significant step toward full implementation of PPBES. The Planning and Budgeting Manual, which replaced the Budget Manual in the existing system, includes a comprehensive section on planning guidelines and forms to provide assistance to operational personnel in planning and budgeting for fiscal year 1971-72. The objectives achieved as a result of the calendar and the manual were (1) the integration of planning and budgeting activities and (2) the implementation of program planning and budgeting at responsibility centers (page 28).

The project staff provided extensive assistance to personnel in support centers during the preparation of program plans and budget requests for 1971-72. Not only did this allow for smooth implementation but provided also the opportunities for valuable inservice training in an "on-site" manner. Documents produced as a result of planning for 1971-72 include:

- Budget Overview: Dade County Public Schools, 1971-72
- Program Memoranda: Regular, Special, and Support Programs, 1971-72
- Program Plans: District and Division Programs, 1971-72
- Program Plans: Capital Projects, 1971-72
- Program Plans: Contracted Projects, 1971-72

DADE COUNTY PUBLIC SCHOOLS PROGRAM STRUCTURE #1

RATIONALE

This program structure is composed of four educational components -- (1) instructional - general, (2) instructional - exceptional, (3) instructional - supplementary, and (4) support. The elements of the components are programs. The following rationale establishes the criteria for placing programs within the educational components.

I. Instructional - General

A program which --

A. Involves students for instructional purposes

B. Is designed for students who <u>are not</u> considered educationally exceptional

C. Does not exist mainly to support other programs.

II. Instructional - Exceptional

A program which --

A. Involves students for instructional purposes

B. Is designed for students who <u>are</u> considered educationally exceptional

C. Does not exist mainly to support other programs

III. Instructional - Supplementary

A program which --

A. Involves students for instructional purposes

B. Exists mainly to support programs classified under I and II

C. Cannot be classified under I or II

IV. Support

A program which --

A. Exists to support programs under I, II, and III

B. Cannot be classified under I, II, or III

3/10/69

PROGRAM STRUCTURE #1

3/10/69

INSTRUCTIONAL GENERAL	INSTRUCTIONAL EXCEPTIONAL	INSTRUCTIONAL SUPPLEMENTARY	SUPPORT
ART	COMPENSATORY	ART	ADMINISTRATIVE Planning and Services
BUSINESS	EMOTIONALLY DISTURBED	CO-CURRICULAR ACTIVITIES	EDUCATIONAL Planning and Services
DRIVER TRAINING	HOMEBOUND/HOSPITAL	COMMUNITY SERVICES	FINANCIAL Planning and Services
ENGLISH (Language Arts)	LEARNING DISABILITIES	CORRECTIVE READING	OPERATIONS Planning and Services
FOREIGN LANGUAGE	MENTALLY HANDICAPPED	GUIDANCE	PERSONNEL Planning and Services
HEALTH/SAFETY/PHYSICAL EDUCATION	PHYSICALLY HANDICAPPED	ITV AND RADIO	PLANT Planning and Services
HOME ECONOMICS	SOCIALLY MALADJUSTED	LIBRARY/AV	
INDUSTRIAL ARTS		MUSIC	
INTERMEDIATE		PSYCHOLOGICAL SERVICES	
KINDERGARTEN		READING	
MATHEMATICS		REMEDIAL READING	
MUSIC		SPEECH THERAPY	
NATURAL SCIENCES			
PRIMARY			
SOCIAL SCIENCES			
VOCATIONAL/TECHNICAL			

DADE COUNTY PUBLIC SCHOOLS PROGRAM STRUCTURE #2

I. THE BASIC LOGIC

The program structure includes categories of activities which reflect various levels of specificity. These categories, summarized in the chart below, are Program Area, Program, Sub-program and Project.

<table>
<tr><td colspan="3">PROGRAM AREA
A grouping of programs which function to produce common major benefits structured by a defined planning viewpoint.</td></tr>
<tr><td>PROGRAM
A grouping of sub-programs which produce related benefits structured by a defined planning viewpoint.</td><td>PROGRAM</td><td>PROGRAM</td></tr>
<tr><td>Sub-program
A set of interdependent activities which have been identified for planning, costing, and evaluating in terms of related objectives.
Project
A set of interdependent activities which have been identified for planning, costing, and evaluating in terms of related objectives and which have been specially funded.
If the objectives of the project are characteristic of more than one sub-program then the project is identified as a separate sub-program. If the objectives of the project are characteristic of only one sub-program, the project is identified within that sub-program.</td><td>Sub-program
Project
Sub-program
Sub-program
Project</td><td>Sub-program</td></tr>
</table>

1/70

II. APPLICATION OF BASIC LOGIC

A. This program structure is a benefit-oriented model of the school system, based on the current administrative and curricular organization.

PROGRAM AREA: INSTRUCTION

A grouping of programs of Dade County Public Schools which function to produce benefits consumed by the individual learner primarily through changes and development of learner concepts, skills and attitudes consistent with the goals of the school system.

PROGRAM

A grouping of sub-programs which produce related benefits structured by the current types of instructional centers.

SUB-PROGRAM

A set of interdependent activities, which have been identified for planning, costing and evaluating in terms of related objectives, yielding benefits directly or indirectly consumed by learners. These instructional sub-programs are classified into five categories:

Direct Learner Consumption

Category 1. Sub-programs whose activities provide instruction to learners not assigned to special target population sub-programs.

Category 2. Specifically identified sub-programs whose activities provide instruction to special target populations.

Category 3. Sub-programs whose activities provide varied services used primarily by learners.

Indirect Learner Consumption

Category 4. Sub-programs whose activities coordinate and improve the functioning of other instructional sub-programs at instructional centers.

Catetory 5. Sub-programs whose activities provide or maintain facilities necessary for the functioning of other instructional sub-programs at instructional centers.

PROGRAM AREA: ADMINISTRATION AND PLANNING

A grouping of programs of Dade County Public Schools which function to produce benefits primarily consumed by the school system as an institution through generating the necessary support to its instructional programs.

PROGRAM

A grouping of sub-programs which produce related benefits structured by current administrative divisions.

SUB-PROGRAM

A set of interdependent activities, which have been identified for planning, costing and evaluating in terms of related objectives, yielding benefits consumed by the school system as an institution. These Administration and Planning sub-programs can be classified into three categories:

Category 1. Sub-programs whose activities coordinate and improve the functioning of other division sub-programs.

Category 2. Sub-programs whose activities yield system-wide benefits within the framework of an administrative division.

Category 3. Sub-programs whose activities provide or maintain facilities necessary for the functioning of other division sub-programs.

B. Activities (including first line supervision) that are instructional, consistent with the definition of the Instructional Program Area, are classified in appropriate sub-programs in the Instructional area, even though the responsibility for the planning and/or management of these activities may fall within the domain of a program in the Administration and Planning Program Area.

C. Administrative or supervisory activities that take place in a responsibility center where instructional programs are being conducted are classified as a sub-program within an instructional program.

DADE COUNTY PUBLIC SCHOOLS PROGRAM STRUCTURE #2

PROGRAM AREA: INSTRUCTION	
ELEMENTARY SCHOOL PROGRAM	MIDDLE/JUNIOR HIGH SCHOOL PROGRAM
Kindergarten Primary Intermediate Health/Safety/Physical Education Summer	Art Business Foreign Language Health/Safety/Physical Education Home Economics Industrial Arts Intermediate Language Arts Mathematics Music Science Social Studies Vocational Training for In-School Youth Summer
English-as-a-Second Language Compensatory Corrective Reading Emotionally Disturbed Hearing Impaired Homebound/Hospital Learning Disabilities Spanish-for-Native Speakers Mentally Handicapped Physically Handicapped Remedial Reading Speech Therapy Socially Maladjusted Visually Handicapped	English-as-a-Second Language Vocational Training for Disadvantaged Youth Compensatory Corrective Reading Emotionally Disturbed Hearing Impaired Homebound/Hospital Spanish-for-Native Speakers Mentally Handicapped Physically Handicapped Remedial Reading Speech Therapy Socially Maladjusted Visually Handicapped
Art Services Co-Curricular Services Community Services Library/AV Services Music Services Guidance/Counseling Services Psychological Services Visiting Teacher Services Media Services Transportation Services School Food Services	Co-Curricular Services Community Services Guidance/Counseling Services Library/AV Services Psychological Services Visiting Teacher Services Media Services Transportation Services School Food Services
Administration/Supervision	Administration/Supervision
Plant Support	Plant Support

1/70

DADE COUNTY PUBLIC SCHOOLS PROGRAM STRUCTURE #2 (Continued)

PROGRAM AREA: INSTRUCTION

SENIOR HIGH SCHOOL PROGRAM	ADULT PROGRAM
Art Business Driver Training Foreign Language Health/Safety/Physical Education Home Economics Industrial Arts Language Arts Mathematics Music Science Social Studies Vocational Training for In-School Youth Summer	Adult Elementary Adult Secondary Employment Training-Apprenticeship Employment Training-Disadvantaged Employment Training-Preparatory Employment Training-Supplemental Employment Training-Adult Preparatory General Adult Special Interest
Compensatory Corrective Reading English-as-a-Second Language Homebound/Hospital Mentally Handicapped Physically Handicapped Spanish-for-Native Speakers Speech Therapy Socially Maladjusted Visually Handicapped Vocational Training for Disadvantaged Youth	Guidance Services Library/AV Services
Co-Curricular Services Community Services Guidance/Counseling Services Library/AV Services Psychological Services Visiting Teacher Services Media Services Transportation Services School Food Services	
Administration/Supervision	Administration/Supervision
Plant Support	Plant Support

1/70

DADE COUNTY PUBLIC SCHOOLS PROGRAM STRUCTURE #2 (Continued)

PROGRAM AREA: ADMINISTRATION AND PLANNING			
DISTRICT ADMINISTRATION/ SERVICES PROGRAM	VOCATIONAL/ TECHNICAL ADULT EDUCATION SUPPORTING SERVICES PROGRAM	EDUCATIONAL PLANNING/SERVICES PROGRAM	FINANCE PROGRAM
District-wide Management	Vocational, Technical and Adult Central Program Planning, Management and Evaluation	Educational Planning Management	Financial Management
District-wide Supervision District-wide Staff/Program Development	Personnel Planning and Services Departmental Program Planning and Services Vocational and Adult Staff and Instruction Materials Development Services Finance and Accounting Purchasing and Inventory Control Vocational, Technical and Adult Pupil Personnel Services Maintenance Planning and Services Operations Planning and Services Physical Plant Planning and Services Transportation Support Services Special Program Support Services	Program Planning & Development Program Evaluation Staff Development Pupil Personnel Services Special Programs Planning and Administration Educational Specifications Planning Educational Media Services	Financial Planning and Budgeting Accounting Auditing Internal Control Payroll
Plant Support	Plant Support	Plant Support	Plant Support

1/70

DADE COUNTY PUBLIC SCHOOLS PROGRAM STRUCTURE #2 (Continued)

PROGRAM AREA: ADMINISTRATION AND PLANNING			
PERSONNEL PROGRAM	PHYSICAL PLANT PROGRAM	SUPPORT SERVICES PROGRAM	SYSTEM ADMINISTRATIVE SERVICES
Personnel Management	Plant Management	Support Services Management	System Management
			Administrative Services Management
Instructional Staffing	Maintenance Administration	School Food Administration	Administrative Research
Non-Instructional Staffing	Operations Administration	Insurance and Safety Administration	Administrative Support Services
Personnel Policy Development and Administrative Staffing	Plant Planning	Purchasing	Central Data Processing
Personnel Operations and Records	Security	Stores and Distribution	Legal Services
		Transportation Administration	Policy Development
			Public Information
			School Activities
Plant Support	Plant Support	Plant Support	Plant Support

1/70

OVERVIEW OF DADE COUNTY PUBLIC SCHOOLS PROGRAM STRUCTURE

(Responsibility Center Dimension)

	Schools					District		System	
	Elementary Centers	Middle/Junior High Centers	Senior High Centers	Adult Centers	Special Centers	Instructional Centers	Support Centers	Instructional Centers	Support Centers
REGULAR PROGRAMS									
Kindergarten	X								
General Instruction	X	X	X						
Occupational Instruction		X	X	X		X			
Continuing Instruction				X		X			
Community Services								X	X
SPECIAL PROGRAMS									
Compensatory						X		X	
Cuban Refugee	X	X	X	X	X				X
Drug Abuse									X
Exceptional Child	X	X	X		X		X	X	X
Reading Remediation	X	X	X	X					X
SUPPORT PROGRAMS									
Instructional Support	X	X	X	X		X	X		X
Auxiliary Services	X						X		X
Facilities Support	X	X	X		X		X		X
Administrative Support							X		X

2/5/71

IDENTIFICATION OF REGULAR PROGRAMS TO THE SUB-PROGRAM LEVEL*

	ELEMENTARY*	MIDDLE/JUNIOR HIGH*	SENIOR HIGH*	ADULT*
GENERAL INSTRUCTION*	Kindergarten Primary Intermediate Supplementary Services Co-curricular	Art Business Education Foreign Language Health Education Home Economics Industrial Arts Language Arts Mathematics Music Physical Education Science Social Studies Co-curricular	Art Business Education Foreign Language Health Education Home Economics Humanities Industrial Arts Language Arts Mathematics Music Physical Education Safety/Driver Education Science Social Studies Co-curricular	
OCCUPATIONAL INSTRUCTION*		Diversified Education Industrial Education	Agriculture Aviation Education Cooperative Business Education Distributive Education Diversified Education Health Related Technology Industrial Education Technical Education Vocational Office Education	Agricultural Education Business Education Distributive Education Vocational Home Economics Industrial Education Technical and Health Occupation Education
CONTINUING INSTRUCTION*				Fundamental/Literacy Education Languages Foreign Languages Mathematics Natural Sciences Social Studies Other General Education
COMMUNITY SERVICES	Inter-level/systemwide: community school activities			

*Denotes level at which controls will be incorporated into the BGT/FRS to support PPBES in startup phase.

2/5/71

IDENTIFICATION OF SPECIAL PROGRAMS TO THE SUB-PROGRAM LEVEL**

COMPENSATORY*
To be determined during the planning/budgeting cycle.

DRUG ABUSE
To be determined during the planning/budgeting cycle.

READING REMEDIATION*
Corrective Reading Remedial Reading

CUBAN REFUGEE*
English as a Second Language Pupil Personnel Services Instructional Development

EXCEPTIONAL CHILD*
Educably Mentally Retarded Emotionally Disturbed Gifted Hearing Impaired Homebound/Hospital Learning Disabilities Physically Handicapped Speech Impaired Socially Maladjusted Trainable Mentally Retarded Visually Handicapped COPE Center Pupil Personnel Services Instructional Development

*Denotes minimum plan/budget/control level.

**Support elements of these special programs which have been so earmarked are identified as sub-programs.

IDENTIFICATION OF THE INSTRUCTIONAL SUPPORT PROGRAM TO THE ELEMENT LEVEL

EDUCATIONAL MEDIA*
Media Administration Instructional Radio/TV* School Library/AV Services* System Media Services

PUPIL PERSONNEL SERVICES*
Pupil Personnel Administration* Guidance/Counseling Services* Psychological Services* Visiting Teacher Services*

INSTRUCTIONAL ADMINISTRATION*
School Administration* Community School Administration*

INSTRUCTIONAL DEVELOPMENT
Program Planning* Program Development* Program Evaluation* Staff Development*

*Denotes plan/budget/control level.

2/5/71

IDENTIFICATION OF THE AUXILIARY SERVICES PROGRAM TO THE ELEMENT LEVEL

SCHOOL FOOD*
School Food Services* School Food Administration*

TRANSPORTATION*
Transportation Services* Transportation Administration*

IDENTIFICATION OF THE FACILITIES SUPPORT PROGRAM TO THE ELEMENT LEVEL

PLANT OPERATIONS*
Operations Services* Operations Administration*

PLANT MAINTENANCE*
Maintenance Services* Maintenance Administration*

PLANT CONSTRUCTION*
Plant Planning* Capital Improvement*

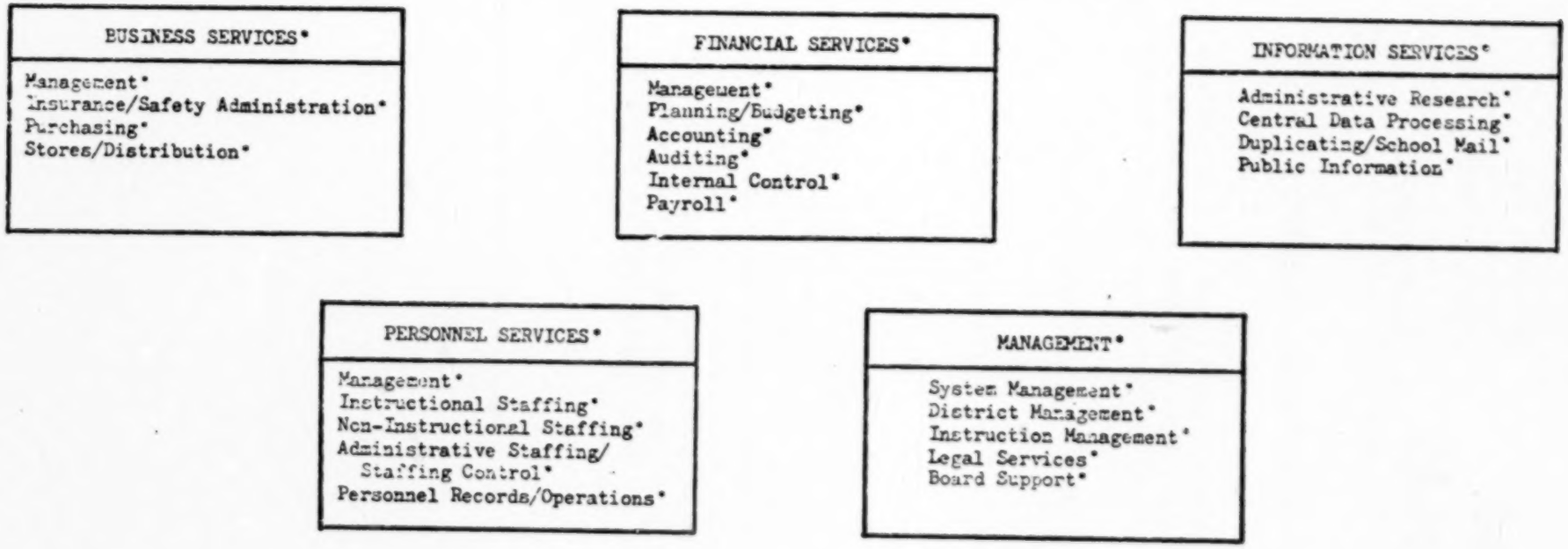
PLANT SECURITY*

PLANT MANAGEMENT*

*Denotes minimum plan/budget/control level.

2/5/71

IDENTIFICATION OF THE ADMINISTRATIVE SUPPORT PROGRAM TO THE ELEMENT LEVEL



*Denotes minimum plan/budget/control level.

2/5/71

PLANNING PROCEDURES AND DOCUMENTATION - PURPOSE

The planning procedures and documentation established in this section in accordance with the **PLANNING AND BUDGETING CALENDAR** included in Section One are intended to accomplish the following major objectives:

(1) to integrate at the operational level program planning and budgeting processes

(2) to produce adequate documentation in support of the proposed budget.

Toward these ends the major thrust in the planning cycle will be the act of program planning at responsibility centers (support centers only for 1971-72). As a result, operational program plans will be produced at those centers. Additionally, two summary planning documents will be available for decision makers during the planning cycle and subsequently published for general distribution; the cycle will culminate with the production of the official budget document of the school system. Brief descriptions of these operational and summary documents appear on page 2-2; their interrelationships are presented in the chart on page 2-3.

PLANNING DOCUMENTS

DOCUMENTS	DESCRIPTION
BUDGET OVERVIEW: DADE COUNTY PUBLIC SCHOOLS 1971-72	The budget document. A document suitable for public distribution which describes the types and quantity of revenues used in funding school system programs, analyzes significant changes in budgetary appropriations systemwide, and summarizes budgetary decisions by program, account, and responsibility center.
PROGRAM MEMORANDA: REGULAR, SPECIAL, AND INSTRUCTIONAL SUPPORT PROGRAMS 1971-72	A summary planning document suitable for public distribution which summarizes budgetary decisions by program, whether at school, district, or division level. Estimated program appropriations which are funded through Part IV will be included as well as appropriations funded by internal funds in the Occupational and Continuing Instruction programs.
PROGRAM MEMORANDA: GENERAL SUPPORT PROGRAMS 1971-72	A summary planning document suitable for public distribution which summarizes budgetary decisions by program (non-instructional) whether at school, district, or division level. Estimated program appropriations funded through Part IV will be included as well as internal funds supporting the School Food program. Proposed capital projects will be summarized within the Facilities Support section.
PROGRAM PLANS: DISTRICT AND DIVISION PROGRAMS 1971-72	An operational planning document for internal use developed at the support center level which identifies planned objectives, resources necessary to accomplish objectives, past year accomplishments and problems, plans to resolve problem areas, and needs for additional funds. In addition, each district/division will submit a summary statement describing significant achievements, both past and planned, for all centers summarized by type.
PROGRAM PLANS: CAPITAL PROJECTS 1971-72	An operational planning document for internal use which describes in detail facilities needs during the next year and over a multi-year period as well as each capital project currently underway.
PROGRAM PLANS: CONTRACTED PROJECTS 1971-72	An operational planning document for internal use which identifies the planned objectives for each probable and funded contracted project, resources necessary for those objectives, and the funding source.

CHAPTER III

RESULTS - DADE COUNTY PPBES OPERATIONAL COMPONENTS

The installation of PPBES processes in Dade County Schools during 1970-71 necessitated defining and operationalizing certain PPB components: a framework for planning and budgeting (Program Structure); the schedule of events and delineation of responsibilities in the planning and budgeting cycle (Planning and Budgeting Calendar); the parameters controlling the planning and budgeting processes (Guidelines for Program Plans); and the output of the planning and budgeting cycle (Planning Documents). Each of these components was developed and installed in the management practices of Dade County Schools by inclusion in the Planning and Budgeting Manual.

Program Structure

The logic underlying the program structure is relatively simple:

Regular Programs: Teacher activities offered to meet the educational needs of children, youth, and adults

- Kindergarten
- General Instruction
- Occupational Instruction
- Continuing Instruction
- Community Services

Special Programs: Integrated teaching, technical, and administrative activities offered to meet the unique needs of clients who cannot be adequately served by regular programs; also the activities designed to meet a critical need

- Compensatory
- Bilingual
- Drug Abuse
- Exceptional Child
- Reading Remediation
- Desegregation

Support Programs: Administrative, technical, and logistical activities necessary to support and complement the educational mission of the school system

- Instructional Support
- Auxiliary Services
- Facilities Support
- Administrative Support

The program definition section of the Planning and Budgeting Manual is presented on the following pages.

PROGRAM DEFINITIONS

PURPOSE: Program definitions are included within this section to aid in the classification according to program of both budget requests and expenditure transactions (all types of appropriations). However, contracted projects and supplemental appropriations are classified within one of the identified programs at the time of funding and consequently definitions are not necessary for coding these appropriations at responsibility centers. These definitions will be most useful for classifying budget requests and expenditures funded by basic appropriations at centers in which more than one program is operating.

METHOD OF DEFINITION: REGULAR and SPECIAL PROGRAMS have been defined, in general, in terms of groupings of specific courses meeting related objectives. These course numbers are identified and defined in the following documents:

Program of Authorized Instructional Courses in Dade County Public Schools: Curriculum Bulletin 1.

and

The Accreditator, Vol. 9, No. 2.

Consequently, these documents should be available as a supplement to this MANUAL at centers in which REGULAR and SPECIAL PROGRAMS are budgeted or classified.

SUPPORT PROGRAMS have been defined in somewhat greater detail in terms of groupings of activities having related objectives.

THE STRUCTURE: In a PPBES a listing of programs is determined by a formal structure. This structure represents a hierarchical grouping of objective-oriented categories with a progression toward their more general applicability to the fundamental goals of an educational organization. The following structure has been used for the defined programs. NOTE: Program budgeting and accounting have been fixed for FY 71-72 at the PROGRAM LEVEL for REGULAR and SPECIAL PROGRAMS and at the SUBPROGRAM LEVEL for SUPPORT PROGRAMS.

EXAMPLE OF DETAIL

	Program	Subprogram	Element
REGULAR	General Instruction*	Mathematics	Algebra 1
SPECIAL	Compensatory*	Language Development	
SUPPORT	Instructional Support	Educational Media*	School Library/AV

*Denotes control level during FY 71-72.

REGULAR PROGRAMS

Kindergarten Program (01)

Direct instructional activities designed for and offered to children during the year immediately preceding first grade. In Dade County the objectives of these experiences are to provide the young child with a learning environment which permits him to utilize his abilities to the highest degree commensurate with his level of development. The program in individual schools may involve early formalized reading, sequential mathematics experiences and structured language development activities, as well as unstructured play, socializing activities, spontaneous expression, and enriching cultural experiences.

General Instruction Program (02)

Direct instructional activities primarily designed for and offered to pupils to enable them to develop and expand in their roles as human beings and citizens. These activities are identified within the following subprograms:

Elementary Schools: Primary, Intermediate, Supplementary Services, Co-curricular Services.

Middle/Junior High Schools:

Art (Courses: 6671, 6672, 6673, 6682, 6683), Business Education (Courses: 7713, 7701, 7702), Foreign Language (Courses: 7523, 7524, 7525, 7533, 7534, 7535, 7513, 7514, 7515, 7543, 7544, 7545, 7501, 7503, 7504, 7505, 7509), Health Education (Courses: 7391, 7392), Language Arts (Courses: 5111, 5112, 5113, 5163, 5173, 5181), Mathematics (Courses: 5211, 5212, 5213, 5215, 5218), Music (Courses: 5610, 5611, 5612, 5631, 5632, 5633, 5613, 5614, 5615, 5616, 5617, 5618, 5619, 5624, 5626, 5634, 5636, 5642, 5643, 5645), Physical Education (Courses: 5551, 5552, 5553, 5561, 5562, 5563), Science (Courses: 5311, 5312, 5313, 5343, 5373), Social Studies (Courses: 6470, 6412, 6478, 6476), Co-curricular Services: after school intramurals and activities.

Senior High Schools:

Art (Courses: 6673, 6674, 6675, 6676, 6683, 6684, 6685, 6686, 6687, 6688, 6689), Business Education (Courses: 7708, 7709, 7713, 7715, 7739, 7743, 8738, 7718, 7716, 7717, 7734, 8737, 7735, 7706, 7707, 7703, 7704, 7705), Foreign Language (Courses: 7523, 7524, 7525, 7526, 7527, 7533, 7534, 7535, 7536, 7537, 7539, 7517, 7528, 7513, 7514, 7515, 7516, 7543, 7544, 7545, 7546, 7503, 7504, 7505, 7506, 7607, 7509), Health Education (Courses: 7393, 7394), Humanities (Course: 7189), Language Arts (Courses: 5114, 5115, 5116, 5128, 5148, 5149, 5163, 5164, 5165, 5166, 5167, 5173, 5174, 5175, 5183, 5184, 5185, 5186, 5187, 5188, 5193, 5196, 5197, 5198), Mathematics (Courses: 5213, 5214, 5299, 5283, 5285, 5115, 5218, 5216, 5217, 5219, 5295, 5286, 5297, 5293, 5266, 5265), Music (Courses: 5613, 5614, 5615, 5616, 5617, 5618, 5619, 5624, 5626, 5634, 5635, 5636, 5637, 5638, 5639, 5643, 5644, 5646, 5645), Physical Education (Courses: 5554, 5555, 5556, 5564, 5565, 5566, 5567, 5568), Safety and Driver Education (Course: 8573), Science (Courses: 5343, 5344, 5347, 5348, 5314, 5373, 5315, 5377, 5365, 5346, 5367, 5369, 5316, 5376, 5317, 5318, 5378, 5319, 5387), Social Studies (Courses: 6414, 6416, 6417, 6425, 6427, 6448, 6463, 6473, 6483, 6493, 6429, 6484, 6476), Co-curricular Services: after school intramurals, activities, and varsity sports.

NOTE: These codes should NOT be used within the Financial Reporting System. Only codes identified within tables of this section should be used.

PLANNING AND BUDGETING MANUAL

REGULAR PROGRAMS (Continued)

Occupational Instruction Program (03)

Direct instructional activities primarily designed for and offered to pupils to prepare them for initial employment or upgrading/updating in an occupation or cluster of occupations. These activities are identified within the following subprograms:

Middle/Junior High Schools: Diversified Education (Courses: 8765, 8769), Health Related Technology (Course: 8007), Home Economics (Courses: 6751, 6752, 6753, 6759), Industrial Arts (Courses: 5831, 5833, 5803, 5837, 5838, 5873, 5853), Industrial Education (Course: 9380), Related Trade/Industrial Technology (Course: 9833).

Senior High Schools:

Agriculture (Courses: 5783, 5784, 5785), Aviation Education (Courses: 9073, 9063, 9065, 9053, 9055, 9080, 9082, 9853, 9855, 9945, 9947), Cooperative Business Education (Course: 7725), Distributive Education (Course: 8726), Diversified Education (Courses: 8753, 8754, 8765, 8769), Health Related Technology (Course: 8009), Home Economics (Courses: 6753, 6755, 6756, 6757, 6758, 6759, 6763, 6764, 6765, 6766, 6767, 6768, 6769, 6773), Industrial Arts (Courses: 5833, 5803, 5807, 5808, 5813, 5814, 5837, 5838, 5823, 5824, 5825, 5873, 5874, 5875, 5863, 5864, 5865, 5843, 5844, 5853, 5854, 5855), Industrial Education (Courses: 9013, 9015, 9017, 9025, 9027, 9033, 9035, 9037, 9043, 9045, 9047, 9133, 9135, 9137, 9143, 9145, 9147, 9183, 9185, 9187, 9193, 9195, 9197, 9205, 9207, 9215, 9243, 9245, 9247, 9255, 9257, 9263, 9265, 9267, 9273, 9275, 9323, 9325, 9327, 9380, 9783, 9785, 9553, 9555, 9557, 9753, 9755, 9757, 9913, 9915, 9917), Related Trade/Industrial Technology (Courses: 9833, 9835, 9837), Technical Education (Courses: 8170, 8121, 8122, 8131, 8136, 8137, 8138), Vocational Office Education (Courses: 7719, 7749).

Adult Centers:

Agriculture Education (Courses: 3751, 3753, 3750, 3752, 3755, 3764, 3758, 3756, 3767, 3754, 3763, 3760, 3757, 3766), Business Education (Courses: 4715, 4283, 4713, 4473, 4724, 4723, 4708, 4716, 4720, 4740, 4718, 4738, 4744, 4743, 4128, 4725, 4726, 4717, 4707, 4706, 4735, 4739, 4741, 4705, 4704), Distributive Education (Courses: 4520, 4521, 4553, 4570, 4530, 4523, 4571, 4572, 4564, 4506, 4507, 4504, 4503, 4502, 4514, 4505, 4582, 4516, 4581, 4580, 4512, 4510, 4511, 4531, 4535, 4593, 4594, 4591, 4590, 4592, 4515, 4501, 4500, 4566, 4560, 4554, 4569, 4561, 4551, 4567, 4568, 4562, 4565, 4534, 4550, 4532, 4513, 4524, 4525, 4522, 4518, 4517), Home Economics Education (Courses: 2800, 2802, 2801, 2809, 2806, 2805, 2811, 2810, 2808, 2807, 2899, 2816, 2815, 2819, 2818, 2817, 2831, 2835, 2825, 2830, 2834, 2833, 2832, 2842, 2843, 2840, 2841, 2850, 2854, 2853, 2852, 2851, 2857), Industrial Education (Courses: 3901, 3902, 3903, 3904, 3989, 3912, 3933, 3939, 3916, 3907, 3905, 3922, 3923, 3910, 3914, 3918, 3935, 3961, 3970, 3913, 3916, 3930, 3941, 3948, 3951, 3959, 3965, 3971, 3972, 3984, 3990, 3921, 3924, 3925, 3928, 3929, 3927, 3977, 3932, 3978, 3926, 3946, 3975, 3945, 3947, 3999, 3909, 3942, 3949, 3955, 3985, 3996, 3994, 3908, 3920, 3969, 3934, 3952, 3919, 3957, 3980, 3938, 3944, 3962, 3986, 3987, 3937, 3973, 3991, 3997, 3998, 3911, 3915, 3988, 3983), Technical and Health Occupations (Courses: 4010, 4042, 4019, 4015, 4045, 4029, 4012, 4014, 4016, 4040, 4022, 4023, 4038, 4035, 4031, 4039, 4032, 4034, 4036, 4047, 4017, 4018, 4020, 4007, 4021, 4026, 3045, 4037, 4025, 4024, 4041, 4033, 4065, 4011, 4013, 3049, 3050, 3051, 3052, 3005, 4027, 4028, 4030, 3056, 3000, 4044, 4043, 4008, 3046, 3047, 3019, 3065, 3053, 3048, 3067, 3055, 3057, 3058, 3036, 3061, 3062, 3044, 3006, 3037, 3004, 3054, 3002, 3001, 3003, 3059, 3038).

NOTE: The codes listed for the adult center within the Occupational Instruction Program are identified and detailed in The Accreditator, Vol. 9, No. 2, and should NOT be used in the Financial Reporting System. Only codes identified within the tables of this section should be used.

REGULAR PROGRAMS (Continued)

Continuing Instruction Program (04)

Direct instructional activities at adult centers only, not included in the definitions for Kindergarten, General Instruction, or Occupational Instruction. This program primarily enrolls persons who have completed the requirements for graduation from high school or who have withdrawn from high school before completing requirements for graduation.

Adult General Courses (Courses: 3677, 2677, 3673, 2673, 3675, 2675, 3676, 2676, 1708, 0708, 1713, 0713, 1735, 0735, 1706, 0706, 1703, 0703, 1538, 0538, 1548, 0548, 1523, 0523, 1533, 0533, 1528, 0528, 1517, 0517, 1529, 0529, 1513, 0513, 1530, 0530, 1543, 0543, 1503, 0503, 3393, 2393, 1813, 0813, 1814, 0814, 1803, 0803, 1804, 0804, 1167, 0167, 1114, 0114, 1117, 1193, 0193, 1148, 0148, 1143, 0143, 1173, 0173, 1215, 0215, 1216, 0216, 1283, 0283, 1297, 0297, 1214, 0214, 1218, 0218, 1295, 0295, 1243, 0243, 1213, 0213, 1219, 0219, 1616, 0616, 1613, 0613, 1634, 0634, 3577, 2577, 1363, 0363, 1314, 0314, 1374, 0374, 1342, 0342, 1343, 0343, 1348, 0348, 1344, 0344, 1316, 0316, 1345, 0345, 1318, 0318, 1471, 0471, 1470, 0470, 1473, 0473, 1463, 0463, 1445, 0445, 1412, 0412, 1416, 0416, 1497, 0497, 1414, 0414, 1400, 0400, 1474, 0474, 1401, 1402, 0402, 1403, 0403, 1418. 0418, 1499, 0499, 1419, 0419, 1413, 0413, 1446, 0446, 1456, 0456, 1459, 0459, 1457, 0457, 1427, 0427, 1425, 0425, 1991, 0991, 1904, 0904, 1906).

NOTE: The codes **listed within the Continuing Instruction Program and identified** and detailed in The Accreditator, Vol. 9, No. 2. These codes should NOT be used in the Financial Reporting System. Only codes identified within the table of codes should be used.

Community Services Program (05)

Direct instructional activities providing services for the community as a whole or some segment of the community. Includes such services as community recreation programs and community leisure time activities at school plants during evenings and weekends.

SPECIAL PROGRAMS

Compensatory Program (10)

Composite instructional and support activities designed for and offered to pupils with economically or socially deprived backgrounds who do not adequately profit from regular programs because of effects caused by such deprivation. Consists primarily of federally funded contracted projects. Instructional/support activities whose primary objectives are not to counteract the effects of such deprivation are not included within this program. Compensatory subprograms are identified within each planning/budgeting cycle (based on an analysis of services within each contracted project).

Bilingual Program (11)

Composite instructional and support activities designed for and offered principally to Spanish-speaking pupils who do not adequately profit from regular programs because of unique socio-linguistic needs. Instructional/support activities not specifically or primarily designed to meet the socio-linguistic needs of Spanish-speaking students are not included wihtin this program. NOTE: In schools designated as bilingual schools, instructional/support activities designed for English-speaking students to develop socio-linguistic capabilities in Spanish comparable to that of a native speaker are included within this program. Instructional/support services are identified within the following subprograms: English as a Second Language (Courses: 5110, 5117; (Adult Centers: 0117), Spanish as a Second Language (in bilingual schools), Spanish for Native Speakers (Course: 7509), Pupil Personnel Services, Instructional Administration.

Drug Abuse Program (12)

Composite instructional and support activities designed for and offered to fulfill a critical school system need by providing information to and facilitating counseling of all pupils concerning the dangers of drug abuse. Consists primarily of activities funded through supplemental appropriations. Instructional/support activities whose primary objectives are not to provide information or counseling about the dangers of drug abuse are not included within this program. Drug Abuse subprograms will be developed during the planning/budgeting cycle.

Exceptional Child Program (13)

Composite instructional and support activities designed for and offered to pupils who do not adequately profit from regular programs because of the following defined exceptionalities: Educable Mentally Retarded, Emotionally Disturbed, Gifted, Hearing Impaired, Homebound/Hospital, Learning Disabilities, Physically Handicapped, Speech Impaired, Trainable Mentally Retarded, Varying Exceptionalities, and Visually Handicapped. Consists primarily of activities funded under the provisions of the Exceptional Child units of the MFP. Instructional/support activities whose primary objectives are not to accommodate or alleviate the effects of the defined exceptionalities are not included within this program. Instructional/support services are

SPECIAL PROGRAMS (Continued)

Exceptional Child Program (13) (Continued)

identified within the following subprograms; Educable Mentally Retarded (Courses: 6850, 6583)*, Emotionally/Socially Disturbed (Course: 6596)*, Gifted (Course: 6593)*, Hearing Impaired (Courses: 6590, 6585)*, Homebound/Hospital (Course: 6520)*, Learning Disabilities, Physically Handicapped (Courses: 6581, 6584)*, Speech Impaired (Courses: 6582, 6585)*, Trainable Mentally Retarded (Course: 6597)*, Varying Exceptionalities (Course: 6589)*, Visually Handicapped (Courses: 6591, 6587)*, CQPE Center, Pupil Personnel Services (Course: 6588)*, and Instructional Development.

Reading Remediation Program (14)

Composite instructional/support activities designed for and offered to pupils who do not adequately profit from regular programs because of a serious or severe deficiency in reading skills and/or comprehension. (Serious/severe deficiency is defined as a stanine score of 2 or lower on the paragraph meaning section of the latest Metropolitan or Stanford Achievement test. See Curriculum Bulletin 1 for additional criteria. Adult Centers: serious/severe deficiency is defined as a lack of an entrance requirement for a specific trade, business, or adult general course as determined by a standardized test. Consists primarily of units funded within basic appropriation/allocation procedures. Instructional/support activities whose primary objectives are not to alleviate serious/severe reading skills/comprehension deficiencies are not included within this program. Instructional services are identified within the following subprograms: Corrective Reading (Courses: 5141, 5142, 5143; Adult Center: 1907)*, Remedial Reading.

Desegregation Program (15)

Composite instructional and support activities designed for and offered to fulfill a critical school system need by providing additional staff and equipment to facilitate the desegregation of students and faculties. Consists primarily of activities funded under the Emergency School Assistance Program. Instructional/support activities whose primary objectives are other than to facilitate the desegregation of students and faculties are not included within this special program. Desegregation subprograms will be developed during the planning/budgeting cycle.

*NOTE: The course numbers identified are those detailed and described within Program of Authorized Instructional Courses in Dade County Public Schools: Curriculum Bulletin 1 (adult center: The Accreditator).

INSTRUCTIONAL SUPPORT PROGRAM

Support activities which directly assist the instructional processes and objectives of the school system by providing certain necessary administrative, technical, and logistical services. These services are identified within the following subprograms: Educational Media, Instructional Administration, Instructional Development, and Pupil Personnel Services.

Educational Media Subprogram (20)

Media Administration:

-Directing, planning, and evaluating Educational Media at a system level.
-Providing staff leadership systemwide toward the more effective utilization of media.
-Anticipating, predicting, and planning for the media needs of schools.

Instructional Radio/TV:

-Creating and providing (writing, programming, and directing) instructional radio and television programs to meet school curriculum needs.

School Library/AV Services:

-Organizing, providing, and managing libraries of books at schools.
-Providing, caring for, and making available audiovisual equipment, materials, and systems at schools.

System Media Services:

-Providing schools and staff personnel with filmed materials.
-Ordering, processing, and distributing books.*
-Providing a professional library for use of staff.

Instructional Administration Subprogram (21)

School Administration:

-Supervising and controlling all operations at a particular school/adult center/special school.
-Assigning duties to staff members.
-Coordinating the planning of instructional programs at a school.
-Improving teaching through leadership and assistance to teaching staff at a center.
-Supervising and maintaining school records.

Community School Administration:

-Supervising and coordinating community school activities.

Program Administration:

-Supervising and controlling operations of a districtwide/systemwide program conducted at many school/adult centers or at non-school locations.

*Does not include the costs of textbooks which should be appropriated within Kindergarten, General Instruction, Occupational Instruction, Exceptional Child, etc.

INSTRUCTIONAL SUPPORT PROGRAM (Continued)

Instructional Development Subprogram (22)

Program Planning:

-Identifying funding sources for contracted programs meeting school system needs.
-Developing and maintaining procedures for initiating, planning, implementing, and operating contracted programs.
-Planning specific learning activities with instructional aids and alternative methods based on identified program needs.
-Supervising and guiding teachers in the use of instructional materials, syllabuses, bulletins, or courses of study.
-Participating in coordinating and planning other support programs related to instructional programs.

Program Development:

-Improving teaching through leadership, guidance, consultation, and assistance to teaching staff.
-Translating research findings and innovative practices into useable materials, processes, and techniques.
-Planning and assisting in the implementation of curricular alternatives and exemplary programs/projects based on school system needs.
-Piloting improved curriculum and curricular practices.

Program Evaluation:

-Assessing the effectiveness of instructional programs/projects.
-Providing information and measures describing individual pupil progress (countywide testing).

Staff Development:

-Providing training experiences designed to incorporate the results of research and innovations into professional and para-professional practices.
-Providing training experiences which contribute to the professional and occupational growth of staff members.

Pupil Personnel Services Subprogram (23)

Pupil Personnel Administration:

-Directing, planning, organizing, and consulting upon Pupil Personnel Services.
-Providing guidelines and procedures for pupil assignments to schools as well as suspensions, expulsions, and exclusions.
-Producing attendance reports for county, state, and federal governments.

INSTRUCTIONAL SUPPORT PROGRAM (Continued)

Pupil Personnel Services Subprogram (23) (Continued)

Guidance/Counseling Services:

-Helping pupils assess and understand their abilities, aptitudes, interests, environmental factors, and educational needs.
-Aiding pupils in making optimum use of educational and career opportunities through the formulation of realistic goals.
-Assisting pupils with personal and social adjustments.
-Working with other staff members in planning and conducting guidance programs.*

Psychological Services:

-Studying individual pupils who are experiencing acute problems of educational development to furnish diagnostic information.
-Suggesting programs for these pupils based on the psychological aspects of the problems.
-Consulting with faculty concerning classroom management and curriculum design.

Visiting Teacher Services:

-Promoting and improving the school attendance of pupils.
-Assisting in the prevention or solution of problems of pupils (family, school, and community relationships) influencing the quality of educational development.

*Includes the salary of the Assistant Principal for Guidance, Guidance clerks, and materials in each school.

AUXILIARY SERVICES PROGRAM

Support activities providing food services for students and providing for their conveyance to and from school activities as provided by state law. This program includes the services defined in the subprograms: School Food and Transportation.

School Food Subprogram (30)

School Food Administration:

-Directing and managing School Food Services.

School Food Accounting:

-Maintaining records of the financial operations and transactions (internal funds) of School Food Services.

School Food Services:

-Preparing and serving nutritionally adequate meals contributing to the health and physical development of students.

Transportation Subprogram (31)

Transportation Administration:

-Directing and managing Transportation Services.

Transportation Services:

-Operating, controlling, and providing vehicles used for pupil transportation.
-Maintaining pupil transportation vehicles in operating condition, including repair of vehicles, replacement of vehicle parts, cleaning, painting, greasing, fueling, preventive maintenance, and inspection of vehicles for safety.

FACILITIES SUPPORT PROGRAM

Support activities providing those services and expenditures necessary for the acquisition, remodeling, operation, care, repair, and protection of those facilities and equipment* necessary for the functioning of the school system.

Plant Operations Subprogram (40)

Operations Administration:

-Providing efficient administration of Operations Services.
-Insuring efficient utilization of utilities.
-Implementing Board policy as it pertains to the use of school facilities for non-school activities.

Operations Services:

-Cleaning the buildings of school plants or supporting services facilities.
-Operating such equipment as heating and ventilating systems.
-Maintaining the grounds of school plants and supporting facilities.
-Providing utilities expenditures.

Plant Maintenance Subprogram (41)

Maintenance Administration:

-Directing, supervising, and improving Maintenance Services.

Maintenance Services:

-Providing labor and materials required to keep all buildings, equipment, and grounds in good condition and proper working order.
-Minimizing deterioration of buildings caused by natural elements and normal usage and maintaining satisfactory interior and exterior appearance.
-Providing services required to relocate portable buildings.

Plant Construction Subprogram (42)

Plant Planning:

-Directing and coordinating procedures necessary for the constructing, remodeling, and occupying of facilities necessary for the school system.
-Coordinating the outlining of environmental requirements and space relations for the specified programs planned at an educational facility.

Capital Improvements:

-Acquiring sites.
-Providing architectural and engineering activities related to site acquisition/improvement and building acquisition/improvement.
-Constructing or improving buildings, including the initial acquisition of required equipment.

*Does not include the costs of new or replacement equipment for currently operating school/support facilities.

FACILITIES SUPPORT PROGRAM (Continued)

Plant Security Subprogram (43)

-Preventing losses to the school system due to vandalism, theft, and arson.
-Investigating violations pertaining to personnel and facilities.
-Preventing and controlling disturbances, demonstrations, or riots in the schools.

Plant Management (44)

-Directing, coordinating, and evaluating all Plant programs.

ADMINISTRATIVE SUPPORT PROGRAM

Support activities which provide certain administrative, technical, and logistical services necessary for the school system as an organization. These services are identified within the following subprograms: Business Services, Financial Services, Information Services, Personnel Services, and Management.

Business Services Subprogram (50)

Management:

-Directing, coordinating, and evaluating Business Services and Auxiliary Services.

Insurance/Safety Administration:

-Developing and recommending systemwide insurance coverage and loss control programs.*

Purchasing:

-Providing services inherent to the purchasing of necessary items at minimum prices meeting specifications on quality, construction and utility.

Stores/Distribution:

-Receiving, processing, and distributing equipment and supplies to schools and other agencies of the system.
-Maintaining necessary custodial, school equipment, and supply inventories.**

Financial Services Subprogram (51)

Management:

-Managing and conducting Financial Services.
-Planning and maintaining a cash investment program.

Planning/Budgeting:

-Developing and maintaining a multi-year financial plan, an annual budget plan, and reporting system.
-Developing and maintaining procedures and systems for integrating program planning and evaluative processes with budget preparation/administration.

Accounting:

-Designing and implementing accounting practices and procedures to insure effective internal control of assets and to retain and preserve basic books of entry.
-Preparing reports of the financial operations and transactions of the school system.

Auditing:

-Protecting the Board's assets (tax and internal funds).
-Evaluating and improving the adequacy of the internal control systems.

*Does not include the costs of insurance which are appropriated within Non-Programmed Costs.

**Does not include the costs of the inventories which are appropriated within Non-Programmed Costs.

ADMINISTRATIVE SUPPORT PROGRAM (Continued)

Financial Services Subprogram (51) (Continued)

Internal Control:

-Maintaining perpetual inventory of fixed assets.
-Instructing school administrators and clerical personnel relative to safeguarding internal funds.

Payroll:

-Providing each employee with a payroll warrant for services rendered.
-Maintaining records of leave and payroll deductions.

Information Services Subprogram (52)

Administrative Research:

-Obtaining data from within the school system and from other school systems which are useful in administrative planning and practice.
-Disseminating such data through the preparation, publication, and distribution of reports and memoranda.

Central Data Processing:

-Providing computer processing for schools and administrative departments on a continuing and onetime basis.
-Providing feasibility studies, technical advice, systems analysis, and programming for schools and administrative departments.

Duplicating/School Mail:

-Providing a large volume duplicating service and small volume copy service for Dade County School administrative offices.
-Providing storage and distribution of software office supplies to non-school centers.
-Providing a systemwide mail service and a U.S. Mail service for LHEC.
-Producing and distributing the directory for Dade County Public Schools.

Public Information:

-Providing the news media through releases or other contact information of significance, value, or interest concerning Dade's schools.
-Providing information on programs, procedures, and personnel of the school system to employees through internal communications.

ADMINISTRATIVE SUPPORT PROGRAM (Continued)

Personnel Services Subprogram (53)

Management:

-Directing, coordinating, and evaluating Personnel Services.

Instructional Staffing:

-Recruiting and evaluating new instructional staff.
-Providing and maintaining a roster of substitutes.
-Counseling and aiding instructional staff regarding evaluation, continuing employment, reassignment, dismissal, and certification.

Non-Instructional Staffing:

-Recruiting, testing, and evaluating applicants for non-instructional and non-administrative positions.

Administrative Staffing/Staffing Control:

-Developing personnel staffing policies.
-Controlling the allocation of instructional positions for schools.
-Providing the services necessary for the identification and selection of qualified administrators.

Records/Operations:

-Maintaining employee records and a personnel records information center.
-Providing certain essential personnel services, e.g., letter of credit references.

Management Subprogram (54)

System Management:

-Coordinating and directing the planning and performance of all programs.
-Proposing plans, policies, and resource allocations to the Board of Public Instruction and communicating its decisions and directives to the staff.
-Serving as official spokesman for the school system.

District Management:

-Providing administrative control and direction for program planning and operations in all schools or centers within a particular district.
-Insuring the implementation of school system plans and policies and assisting the Superintendent in their formulation.
-Coordinating and maintaining community relations within a particular district.

Instructional Management:

-Organizing, directing, and coordinating the Instructional Support program at a system level.
-Proposing policies, plans, and guidelines for systemwide educational planning and instructional development.

ADMINISTRATIVE SUPPORT PROGRAM (Continued)

Management Subprogram (54) (Continued)

Board Support:

-Providing necessary expenditures to support the functioning of the Board of Public Instruction.

Legal Services:

-Providing all legal services needed in the operation of the school system, including representing the Board in all litigation.
-Providing legal counsel to the Board, the Superintendent, and all administrators upon request.

NON-PROGRAMMED COSTS (90)

Budgeted items which cannot be assigned to a program or subprogram because they do not directly relate to the defined activities of any particular program or subprogram. Includes such items as:

- Plant rentals
- Sabbatical leave*
- Retiree sick pay*
- Remittances to outside agencies**
- Budget transfers**
- Contingency funds**
- Encumbered cash balance**
- Stores inventory**
- Commission-debt service**
- Inactive contracted projects
- Inactive supplemental appropriations

Also included are budgeted items which are temporarily assigned to non-programmed until the proper assignments can be determined. Includes such items as:

- Growth Accounts**
- Summer Appropriations
- **Financial Accounts****

*Personnel Division Only
**Finance Division Only

Planning and Budgeting Calendar

The planning and budgeting calendar established the dates for the significant events in the budget preparation cycle, integrated the planning and budgeting processes, and identified organizational responsibilities for the activities and processes during the cycle. The calendar is presented on pages 50-56.

PLANNING/BUDGETING CALENDAR FOR PREPARATION OF 1971-72 BUDGET

FEBRUARY

15 Planning and Budgeting Manual published by Finance Division and distributed to District Offices, Division Offices and Schools.

15 Handbook of Instructional and Clerical Allocations to Schools and District Offices distributed by Personnel Division.

15 Department of Administrative Research submits average salary data to Finance Division.

19 Personnel Division forwards to district offices proposed allocation of units for Cuban Refugee, Driver Training, and Exceptional Child Programs.

19 Personnel Division forwards to district offices proposed allocation of units for Vocational/Technical Program.

22,23 Finance Division conducts allocation/planning/budgeting orientations* for district office personnel.

25,26 Finance Division conducts allocation/planning/budgeting orientations** for division office personnel.

*Includes: (1) planning and budgeting procedures and guidelines for district office and school programs funded through parts I and III of the operating budget
(2) distribution of allocation forms
(3) distribution of planning/budgeting forms

**Includes: (1) planning and budgeting procedures and guidelines for divisional programs funded through parts I and III of the operating budget
(2) distribution of allocation forms
(3) distribution of planning/budgeting forms

MARCH

1 Physical Plant Division provides utilities estimates and custodial personnel allocations for each school to Finance Division.

1 Physical Plant and Finance Divisions finalize planning and budgeting procedures for capital projects funded through Part III of the budget.

1 Division of Instruction and Finance Division finalize planning and budgeting procedures for contracted projects funded through Part IV of the budget.

2 Finance Division begins preparation of budgetary documentation for Debt Service (Part II) and supporting bond repayment schedules.

15 Each district office submits to Finance Division for each school the projected peak pupil membership in Regular and Special programs and school personnel allocations for Regular, Special and Instructional Support Programs based on Handbook of Instructional and Clerical Allocations to Schools and District Offices.

15 Computerized Annual Budget System readied for operation by Finance Division and Department of Data Processing.

PLANNING AND BUDGETING MANUAL

APRIL

5 Each division office forwards first draft of Program Plans: Division Programs 1971-72 (planning forms) and budget request form to Finance Division for analysis and processing, including requests for increased basic appropriations and requests for supplemental appropriations.

5 Each district office forwards first draft of Program Plans: District Programs 1971-72 (planning forms) and budget request form to Finance Division for analysis and processing, including requests for increased basic appropriations and requests for supplemental appropriations for all district responsibility centers.

5 Physical Plant Division forwards first draft of Program Plans: Capital Projects 1971-72 (planning form) and budget request form to Finance Division for analysis and processing.

5 Division of Instruction forwards first draft of Program Plans: Contracted Projects 1971-72 (planning form) to Finance Division for analysis and processing.

7 Finance Division forwards first draft of Program Plans: District Programs 1971-72 to Division of Instruction for preliminary development of Program Memoranda: Regular, Special and Instructional Support Programs 1971-72.

12 Finance Division forwards budget request forms to Central Data Processing.

19 Central Data Processing forwards preliminary budget printouts to Finance Division for verification.

20 Finance Division distributes preliminary budget printouts to district and division offices.

26-30 Finance Division conducts review of preliminary program plans/ budget with each district office and each division office.

30 Revisions of budget request forms completed by district offices, division offices and Finance Division.

MAY

3 Finance Division forwards revised budget request forms (district/division offices) to Central Data Processing.

7 District offices forward revised school allocation forms (based on Spring registration) to Finance Division for analysis.

11 Finance Division forwards revised school budget request forms to Central Data Processing.

14 Each division office submits to Finance Division revised Program Plans: Division Programs 1971-72.

14 Each district office submits to Finance Division revised Program Plans: District Programs 1971-72.

14 Physical Plant Division submits to Finance Division revised Program Plans: Capital Projects 1971-72.

14 Division of Instruction submits to Finance Division revised Program Plans: Contracted Projects 1971-72.

14 Finance Division forwards revised Program Plans: District Programs 1971-72 to Division of Instruction.

17 Preliminary Accounting Closing for 1970-71.

17 Central Data Processing forwards revised preliminary budget printouts to Finance Division for verification.

18 Finance Division distributes revised preliminary budget printouts to district and division offices.

20 Superintendent reviews with Finance Division the preliminary balanced budget, Program Plans: District and Division Programs 1971-72, Program Plans: Capital Projects 1971-72, Program Plans: Contracted Projects 1971-72 and requests for increased basic funding and supplemental appropriations.

MAY (Continued)

21 Superintendent reviews with Finance Division first draft of Program Memoranda: General Support Programs 1971-72.

21 Superintendent reviews with Division of Instruction first draft of Program Memoranda: Regular, Special, and Instructional Support Programs 1971-72.

24 Finance Division notifies districts/divisions of disposition of requests for supplemental appropriations and requests for increased basic funding for fiscal year 1971-72.

24 Finance Division revises revenue estimates, if necessary; coordinates completion of Program Plans: District and Division Programs 1971-72, Program Plans: Capital Projects 1971-72 and Program Plans: Contracted Projects 1971-72.

31 End of legislative session for 1971. Finance Division makes final revision in plans/budgets, if necessary.

JUNE

1 Finance Division forwards balanced budget proposal (Parts I, II, III, IV), Program Plans: District and Division Programs 1971-72, Program Plans: Capital Projects 1971-72, and Program Plans: Contracted Projects 1971-72 to Superintendent.

1 Finance Division forwards Program Memoranda: General Support Programs 1971-72 to Superintendent.

1 Division of Instruction forwards Program Memoranda: Regular, Special and Instructional Support Programs 1971-72 to Superintendent.

2 School Board approves proposed Fiscal Year 1971-72 Budget for public hearing.

9 1971-72 budget is advertised in the Miami Herald.

11 Program Memoranda: Regular, Special and Instructional Support Programs 1971-72 is published and made available for distribution.

11 Program Memoranda: General Support Programs 1971-72 is published and made available for distribution.

14 Superintendent forwards program memoranda and Budget Overview: Dade County Public Schools 1971-72 to School Board members.

16 Public Hearing on 1971-72 budget is held.

24 Florida State Department of Education sends confirmation of revenue estimates to Finance Division.

JULY

1 Tax Assessor certifies estimated 1971 Tax Roll.

7 Superintendent forwards final budget to School Board for adoption.

15 Final Accounting Closing for fund balances and revised revenue estimates.

29 Finance Division mails official state budget forms to Florida State Department of Education.

Guidelines for Program Plans; Planning Documents

Instructions for preparing budget requests and program plans were developed and published in the manual in the form of guidelines to be followed by administrative personnel during the budget/planning cycle. There are major sections of guidelines:

- Planning Procedures and Documentation - Purpose (page 58)
- Instructions for Preparing Annual Budget Request (pages 59-62)
- Guidelines for Developing District/Division Program Plans (pages 63-87)
- Guidelines for Developing Plans for Capital Projects (pages 88-98)
- Guidelines for Developing Plans for Contracted Projects (pages 99-111).

In addition, the identification of planning documents to be produced during the cycle is included (pages 112-113).

PLANNING AND BUDGETING MANUAL

section: 2	change no:
page no: 2-1	
effective date: July 1, 1971	
revision date:	

PLANNING PROCEDURES AND DOCUMENTATION - PURPOSE

The planning procedures and documentation established in this section in accordance with the PLANNING AND BUDGETING CALENDAR included in Section One are intended to accomplish the following major objectives:

(1) to integrate at the operational level program planning and budgeting processes

(2) to produce adequate documentation in support of the proposed budget.

Toward these ends the major thrust in the planning cycle will be the act of program planning at responsibility centers (support centers only for 1971-72). As a result, operational program plans will be produced at those centers. Additionally, two summary planning documents will be available for decision makers during the planning cycle and subsequently published for general distribution; the cycle will culminate with the production of the official budget document of the school system. Brief descriptions of these operational and summary documents appear on page 2-2; their interrelationships are presented in the chart on page 2-3.

INSTRUCTIONS FOR PREPARING ANNUAL BUDGET REQUEST

The Annual Budget Request form (see specimen copy following instructions) is the input document to the computer program that produces a series of annual budget reports (BGT). To simplify the collection of annual budget data, a single form was designed which will be used to request the following: (a) Basic Appropriation - operating funds for maintaining the regular ongoing programs at current level; (b) Supplemental Appropriation - those programs, both instructional and support, that operate on a year-to-year basis pending annual review; (c) New Appropriation - request for additional funding for expansion of existing regular program over current level or new program. The routing for each type of appropriation request from originator through reviewing body, if any, and final insertion into the annual budget proposal will be given in a separate memorandum.

To facilitate preparation of the Annual Budget Request, the following explanations and comments are given for each data block on the subject form. The following items are self-explanatory: MONTH/DATE/YEAR, FISCAL YEAR, PAGE NUMBER, PREPARED BY. In the lower right-hand position, check one box as appropriate for BASIC, SUPPLEMENTAL, OR NEW APPROPRIATION as defined above. The PRIORITY NUMBER is used for both supplemental and new appropriation and should indicate the order of need as determined by the originating district or division office. All supplemental and new appropriation requests will need a review and final authorization signatures, otherwise, basic appropriation requests should have the authorization signature of the respective district or division superintendent's signature.

CONTROLS

Responsibility Center. . . . . Enter four-digit code formerly called "Work Location". This number appears on your Payroll Attendance Roster, and a complete listing of all responsibility center codes is given in Section Four of this Manual. New codes are assigned by the Budget Office upon request.

Program Number . . . . . These four-digit numbers are new for 1971-72. A list of all numbers to be used and descriptions of the programs can be found in Section Four of this Manual.

CONTROLS (Continued)

Account Number.	Enter the six-digit account number in this space. For account numbers and account definitions, see Section Four of this Manual.

REFERENCE

Item Identification	Use this space to describe non-salary budget items, such as equipment, office supplies, out-of-county travel, car allowance, etc.

Personnel Identification - Full-time Instructional Personnel:

Last Name	Enter first eight letters of last name.
Pay Schedule.	Use two-digit code: 00 for A, 01 through 11 for A1 through A11.
Rank/Column	Enter one digit for rank as follows: 0 for Rank 1 1 for Rank 1A 2 for Rank 2 3 for Rank 3 Then enter one-digit column for teachers only: 1 for Column 1 2 for Column 2 3 for Column 3 0 for other personnel
Step.	Enter 01 through 16 for teachers, otherwise 01 through 05 for other personnel with increments.

Personnel Identification - Full-time Administrative and Support:

Last Name	Enter first eight letters of last name.
Pay Schedule.	Enter U0 through U7. Use H0 for building trades employees
Grade	Enter two-digit grade from Salary Handbook.
Step.	Enter two-digit step that becomes effective July 1, 1971. Example: 01,02,03, 04,05,06, L1, L2.

PROJECTED AMOUNTS

Budget Next Year. . . . . Estimate whole dollars only. Show 00 in CENTS column. As employees will be listed individually, show 001 in the EMPLOYEES column. The CR column, when marked with a minus sign, will indicate a negative budget amount, either dollars or number of employees.

Expenditures this year. . . . . Estimate the total year's expenditures for each line item. In the EMPLOYEES column, show actual number on board - will usually be 001.

NOTES:
1. If an expense item is incurred in the current year and will not be repeated next year, the BUDGET NEXT YEAR column will be blank and the EXPENDITURES THIS YEAR column will be filled out. When requesting a new budget item, leave the EXPENDITURES THIS YEAR column blank.

2. For part-time and overtime personnel, names do not have to be entered, rather, use a brief description, such as, Overtime, Part-time, etc. in the REFERENCE area.

DATE ___/___/___
MONTH DAY YEAR

DADE COUNTY PUBLIC SCHOOLS
ANNUAL BUDGET REQUEST
FOR FISCAL 197__-7__

PAGE ____ OF ____

CONTROLS

RESP. CTR. 6-9	PROGRAM NO. 10-13	ACCOUNT NUMBER 14-19

REFERENCE

ITEM DESCRIPTION / LAST NAME 20-27	PERSONNEL IDENT. PAY SCHED 28-29	GRADE BR/COL 30-31	S.EP 32-33

PROJECTED AMOUNTS

BUDGET NEXT YEAR DOLLARS & CENTS 34-42	CR 42	EMPLOYEES 43-45	CR 45	EXPENDITURES THIS YEAR DOLLARS 46-52	CR 52	EMPLOYEES 53-55	CR 55

SPECIMEN COPY

PREPARED BY

REVIEWED BY

AUTHORIZED BY

(CHECK ONE)

☐ BASIC APPROPRIATION
☐ SUPPLEMENTAL APPROPRIATION
☐ NEW APPROPRIATION

PRIORITY NUMBER

GUIDELINES FOR DISTRICT AND DIVISION PROGRAM PLANS

PURPOSE: The primary purpose for developing guidelines for program planning at responsibility centers within districts and divisions is to provide the methods and procedures to enable center administrators to plan and budget their programs for the next fiscal year as an integrated process. The secondary purpose for developing standardized planning guidelines is to facilitate the development of program plans which when examined with program budgets portray resource requirements in terms of desired outcomes. In addition, the development of program plans using standard formats enables plans originating from many centers at different districts/divisions to be easily integrated into comprehensive supporting documents for the budget proposal.

CIRCULATION AND USAGE: These guidelines are intended to facilitate the development of PROGRAM PLANS: DISTRICT AND DIVISION PROGRAMS 1971-72. This document will be a direct compilation of program plans and budgets from each support responsibility center grouped by each district and division.* It is anticipated that the Finance Division will not edit or alter center program plans but will include them as received. This compilation of program plans and budgets will serve primarily as an internal working document during budget preparation and is not intended for public distribution. Program plans and budgets, however, will be used as source documents in the development of summary planning documents and the budget document which are intended for public distribution (See OVERVIEW OF PLANNING DOCUMENTS AND BGT REPORTS).

*This compilation will include program budgets (without program plans) for schools, instructional centers, and miscellaneous centers grouped in appendices by district and division.

GUIDELINES FOR DISTRICT AND DIVISION PROGRAM PLANS (Continued)

APPLICABILITY: PROGRAM PLANS (FORM 30A) and IDENTIFICATION OF OBJECTIVES AND REQUIREMENTS (FORM 30B) should be developed for each program at each support responsibility center for which basic appropriations are requested.* The Responsibility Center Section of the PLANNING AND BUDGETING MANUAL (Page 4-22) should be used to determine the applicability of these guidelines for each responsibility center. A supplement to this manual which identifies programs for each support center is available. Specific guidelines and specimen copies of FORM 30A (Page 2-7) and FORM 30B (Page 2-11) are included within this section.

REQUEST FOR NEW/SUPPLEMENTAL APPROPRIATIONS (FORM 30N/S) should be developed for each requested new/supplemental appropriation at each responsibility center. District Offices are requested to insure that such requests from all schools within their district are completed and forwarded to the Finance Division in accordance with the PLANNING AND BUDGETING CALENDAR. However, district offices may choose to develop a single FORM 30N/S for a request at several schools for the same type of supplemental appropriation, e.g., Special Assistants for Pupil Conduct Control (See specific guidelines for FORM 30N/S for details). A supplement to this manual which identifies all supplemental appropriations at all responsibility centers grouped by district and division is available. Specific guidelines and a specimen copy of FORM 30N/S are included on Page 2-19.

*FORM 30A and 30B should NOT be developed for PLANT OPERATIONS (exception: 9221) and SCHOOL FOOD (exception: 9025, 9161). However, a budget request for PLANT OPERATIONS and SCHOOL FOOD at centers in which it has been budgeted in the past should be entered on the budget request form.

GUIDELINES FOR DISTRICT AND DIVISION PROGRAM PLANS (Continued)

DISTRICT/DIVISION SUMMARY (FORM 20) should be developed by each district and division to accompany center program plans and budgets. Specific suggestions for this are included on Page 2-26.

GROUPING: For consistency, the following grouping should be used for the planning forms.*

A. District/Division Summary (FORM 20).

B. FORM 30A, FORM 30B, FORM 30N/S by support center in numerical order (center code number).

C. FORM 30N/S for each requested new/supplemental appropriation at other centers, in numerical order.

*Budget request forms should be submitted along with program plans in accordance with the PLANNING AND BUDGETING CALENDAR and the instructions for the preparation of Budget Request forms found in Section One.

PLANNING AND BUDGETING MANUAL

GUIDELINES FOR PROGRAM PLANS
(FORM 30A)

I. D. SECTION:

Responsibility Center Name: enter the name of the responsibility center as it is listed in the table of responsibility centers in the PLANNING AND BUDGETING MANUAL (Page 4-22).

Number: enter the corresponding R.C. Number (four digits) from the PLANNING AND BUDGETING MANUAL (Page 4-22).

Program Name: enter name of program from the table of basic and summer appropriations in the PLANNING AND BUDGETING MANUAL (Page 4-35).

Number: enter the corresponding program number (four digits) from the PLANNING AND BUDGETING MANUAL (Page 4-35).

Prepared by: enter the first initial and last name of the administrator responsible for the preparation of the plan.

Reviewed by: enter the first initial and last name of the district/division superintendent.

Date: enter the date on which the review was completed.

SUMMARY REVIEW OF CURRENT YEAR OPERATIONS: Summary information describing program operations during the current fiscal year. This information should be narrative in form.

Quantitative Expressions of Services Should Be Included: Data describing the scope/quantity and effectiveness of services provided during the fiscal year should be provided if already available or if reasonably obtainable.

GUIDELINES (FORM 30A) (Continued)

Significant Achievements/Problems Should Be Highlighted: A brief narrative summarizing significant achievements or problems during the current fiscal year should be readily identifiable. Examples might be the substantial revision of policies or procedures or the development of significant curriculum materials.

Program Changes Due to Administrative Action Should Be Emphasized: If administrative assignments or clarifications resulted in changes in the nature or quantity of services, these should be carefully and adequately identified.

DESCRIPTION OF PLANNED PROGRAM IMPROVEMENTS/CHANGES: A narration of improvements and changes which are planned for the 1971-72 fiscal year. These improvements should be limited to those which can be accomplished by the use of basic appropriations only. If no significant changes or improvements have been planned, this section should not be completed.

PROGRAM PLANS

Identification Section	Responsibility Center Name	Code Number	Program Name	Code Number	Prepared by	Reviewed by	Date

SUMMARY REVIEW OF CURRENT YEAR OPERATIONS

68-71

DESCRIPTION OF PLANNED PROGRAM IMPROVEMENTS/CHANGES

GUIDELINES FOR IDENTIFICATION OF OBJECTIVES AND REQUIREMENTS
(FORM 30B)

I. D. SECTION:

Responsibility Center Name: enter name of responsibility center which is contained on accompanying FORM 30A.

Number: enter corresponding number.

Program Name: enter name of program which is contained on accompanying FORM 30A.

Number: enter corresponding number.

OBJECTIVES: Identification of program objective(s). Objectives previously developed by districts/divisions should be useful for this purpose. However, since a careful review and analysis of objectives is an integral component of any program planning process, these objectives should be carefully reviewed to determine if:

a. administrative reassignments or clarifications have occurred in the interim which require changing the objective(s) as previously stated.

and/or

b. the objective(s) as stated readily communicate the major categories of services for which resources are requested and planned at the particular responsibility center.

and/or

c. the objective(s) as stated are useful for planning the work activities at the particular responsibility center.

GUIDELINES (FORM 30B) (Continued)

Objectives Should Reflect the "What" and Not the "How": Statements of objectives should represent the purposes or categories of service which are accomplished by activities at the center. Objectives should be carefully edited to determine if they are in all cases statements of outcomes from activities.

The "Other" Objective May Be Used: Responsibility center administrators may find it useful to group a series of minor routine services in an "other" objective after they have identified sereral major objective for their center. Such an objective might be worded:

> "To provide those other services (service name, service name, service name) which are required."

Short-Term Objectives Can Be Developed: Administrators may wish to single-out a project-like objective which is valid only for the next fiscal year. Such an objective might involve the installation of a new computerized reporting system, or the substantial revision of certain procedures or policies. Such an objective should be labeled: FY 71-72 ONLY.

Terms such as Effective, Efficient, Improved Should Be Minimized: Objectives should contain minimal reference to providing efficient or effective service since it is assumed that all service will be provided in the most efficient and effective manner possible. Such concepts should, however, be incorporated in the INDICATORS section by the use of qualitative measurements.

A Limited Number of Objectives Should Be Identified: The number of objectives identified at any one responsibility center for any one program should be limited to five or less. This may be accomplished by combining more detailed statements of program objectives into more general statements or the "other" objective.

GUIDELINES (FORM 30B) (Continued)

ACTIVITIES: The typical work activities necessary to accomplish each stated objective. This statement of activities should be brief and specific. Administrators may find it useful to specifically name the types of personnel, and/or types of materiel and equipment which are used in each work activity.

Improvements Should Not Be Emphasized: The description of work activities should NOT particularly emphasize improvements which have been planned for center activities. The improvements section of FORM 30A has been established for that purpose. The description of activities within this section should describe those activities, whether improved or routine, which are necessary to accomplish each objective.

INDICATORS: Measurements which adequately report the degree of attainment of each objective. Previously developed statements of program indicators should be useful for this purpose, although they should be carefully reviewed and updated, if necessary.

Indicators Should Be Measurable: Each indicator should be measurable. It is anticipated that responsibility centers will be requested to file PROGRAM REPORTS on a quarterly basis during the next fiscal year including actual data for each indicator. Consequently, each responsibility center administrator should assure that data for each indicator will be available during the next fiscal year either from existing administrative reports or from feasible tally or recording procedures.

Both Quantitative/Qualitative Indicators Should Be Identified: It is desirable that the set of indicators identified for each objective contains items reflecting both the sheer volume of services provided as well as the effectiveness or quality of those services. Examples of typical quantitative and qualitative indicators by program have been identified for illustration purposes on Page 2-14.

ILLUSTRATIVE INDICATORS

	QUANTITATIVE INDICATORS	QUALITATIVE INDICATORS
Instructional Support Programs	Number of curriculum materials and guidelines (named) produced.	Number of schools using each type of material produced. Number of unsolicited requests for materials/guidelines.
	Number of home visits undertaken. Number of faculty and parent conferences held.	Number of children exhibiting satisfactory attendance patterns (less than three unexcused absences per semester) after referral services.
	Number of media materials (by type) sent to schools upon request.	Number of rejections of school requests. Measured satisfaction of school/staff personnel with central media distribution.
Auxiliary Services Programs	Number of pupils transported to and from assigned schools.	Accident rate per 100,000 miles for total transit operations.
Facilities Support Programs	Number of work orders completed (by area).	Average labor and material cost per work order (by area). Number of repeat work orders (by area).
	Number of requests for use of school facilities for nonschool activities processed.	Total uncollectable accounts for use of school facilities in dollars.
	Number of incidents investigated.	Number of subjects identified and prosecuted.
Administrative Support Programs	Number of payroll warrants issued each month.	Number of no-pays for each pay period.
	Number of news releases or contacts initiated categorized according to subject.	Number of releases or material from releases actually utilized in target media.
	Number of requisitions or documents processed per month.	Average time for processing a sample of requisitions or documents.

GUIDELINES (FORM 30B) (Continued)

Indicators Should Only Reflect Program Objectives at the Particular Responsibility Center: Indicators as stated should be carefully analyzed to determine if they describe program objectives at the particular responsibility center. Centers with responsibility for the planning and coordination of a program operating at many schools and support centers should include only indicators reflecting program objectives for resources budgeted at the center.

A Limited Number of Indicators Should be Identified: In most cases the number of indicators identified for each objective should be five or less. Only those indicators should be chosen which best describe the degree of attainment of program objectives at the center.

PERSONNEL REQUIREMENTS: the personnel required to attain each of the objectives. All personnel should be included (including part-time and overtime) which are identified on the budget request form for basic appropriations. The identification of the planned usage of personnel by objective should better communicate resource requirements at the center.

Code: Each BPI account code included within the budget request form (salary accounts only) should be identified within this section with all employees with the same account code grouped as a single entry. Requests for part-time or overtime employees should be grouped with the regular account code.

No.: The total number of employees requested within any one account should be grouped as a single entry within this block.

GUIDELINES (FORM 30B) (Continued)

Several Account Codes May Be Combined into a Single Entry: Most responsibility centers will find that the form as designed (five available account code entries) is sufficient. However, centers with a large number of accounts budgeted should group these accounts into the following categories and use the code number (state account code) identified below:

CATEGORY CODE	B.P.I. ACCOUNT CODE
2014	2014.10, 2014.00
2110	2112.00, 2113.00, 2115.00
2211	2211.10, 2211.00
2214	2214.30, 2214.40, 2214.50, 2214.60, 2214.90

Percentages Should Be Used for the Estimation: Estimates of personnel requirements by objective should be expressed in percentages. A single account code entry (including part-time and overtime) should be treated as a whole with a single percentage entered in the appropriation column adjacent to the applicable objective. Employees within a single account code who are utilized to meet different objectives may be estimated as a single unit or averaged percentagewise using the formula:

$$\frac{A\% + B\% + C\%}{\text{No. Emp.}}$$

In all cases, the total of entered percentages should not exceed 100%.

GUIDELINES (FORM 30B) (Continued)

Methods for Determining Estimates Are Optional: Responsibility center administrators may use any method which they feel will result in reasonably accurate estimates of personnel requirements by objective. Many administrators will find it practical to use their own past experience as the basis for estimation. If the work force at a responsibility center is large, however, it may be necessary to circulate an informal survey among employees identifying the objectives/services, requesting employees to estimate the proportion of their time which is spent for each service, and compiling the results.

SPACING OF OBJECTIVES/ACTIVITIES/INDICATORS/REQUIREMENTS: A set of an objective, activities, indicators, requirements should generally require an entire side of this form. However, if two such sets can be entered on one side, type a double line between the two identified objective sets.

IDENTIFICATION OF OBJECTIVES AND REQUIREMENTS

Responsibility Center Name:	Code Number:	Program Name:	Code Number:

Objective	Activities	Indicators	Personnel Requirements					
			Code					
			No.					

Form 30B

80

GUIDELINES FOR REQUEST FOR NEW/SUPPLEMENTAL APPROPRIATIONS
(FORM 30N/S)

I. D. SECTION:

Responsibility Center Name: enter the name of the responsibility center as it is listed in the table of responsibility centers in the PLANNING AND BUDGETING MANUAL (Page 4-22).

Number: enter the corresponding R.C. number (four digits) from the PLANNING AND BUDGETING MANUAL (Page 4-22).

Supplemental Appropriations/Program Name:

Supplemental: Continuation: enter the name of the supplemental appropriation which is found in the table of supplemental appropriations in the PLANNING AND BUDGETING MANUAL (Page 4-37).

Supplemental: New: identify a name for the supplemental appropriation (35 spaces or less) which expresses the purpose of the request.

New: Increased Basic: enter the name of the program in which the expansion is requested. See the table of basic/summer appropriations of the MANUAL (Page 4-35).

Number:

Supplemental: Continuation: enter the corresponding program number (four digits) from the MANUAL (Page 4-37).

Supplemental: New: DO NOT FILL IN

New: Increased Basic: enter the corresponding program number which is found in the MANUAL (Page 4-35).

GUIDELINES (FORM 30N/S) (Continued)

Date: enter the date on which the review was completed.

Prepared by: enter the first initial and last name of the administrator responsibile for the preparation of the request.

Reviewed by: enter the first initial and last name of the district/divisional superintendent.

New Appropriation: to be checked if the request is for an expansion of basic appropriations.

Supplemental Appropriation: New: to be checked if the request is for a new supplemental appropriation.

Supplemental Appropriation: Continuation: to be checked if the request is for continuation of a supplemental appropriation.

District/Divisional Priority: A single number should be entered in this block by the district/divisional superintendent or his representative identifying the priority of this particular request compared to all other district/divisional requests for new appropriations and new or continued supplemental appropriations. Each request for a new/supplemental appropriation should have an unique priority number with numbers descending in priority ranking (1, 2, 3, ...). NOTE: The highest priority request within each district/division should begiven the number one.

GUIDELINES (FORM 30N/S) (Continued)

DOCUMENTATION OF NEED FOR NEW/SUPPLEMENTAL APPROPRIATIONS: The need for this appropriation should be briefly described within this section. In most cases, this description should emphasize and narrate the reasons (system growth, extenuating circumstances, developmental activities) why the basic appropriations for a program at a particular center are not sufficient to provide a satisfactory level of service.

The Use of Quantitative Descriptions of Need Are Desirable: Descriptions of need should contain statistical information, if possible. This may be accomplished by citing the growth in the size of the service area (for example, an increase in the number of buildings which must be serviced) or by using comparative statistics from other school systems. In any case, the description of need should be as specific as possible and clearly document the need for the appropriation.

Identification of Current Year Problems May Be Desirable: If the need for a new/supplemental appropriation has arisen from significant problems which were encountered during the current year, it would be desirable to highlight these problems. If possible, the identification of these problem areas should be augmented by the use of statistical information.

Requests for Developmental Activities Require Expanded Documentation: Requests for developmental activities should include an identification of the need or desirability of such development, a brief description of the type of activities which will occur (school/instructional centers only) and an identification of the potential users of the development.

GUIDELINES (FORM 30N/S) (Continued)

Requests for a Supplemental Appropriation at Schools/Instructional Centers: A request for a supplemental appropriation at a school or instructional center should essentially contain the same type of information which is indicated in the preceeding page. However, since the objective of this section is to adequately communicate the need for the appropriation, requests from schools/instructional centers may need to expand their description to include other types of information which are not identified within these guidelines.

Requests for the Continuation of a Supplemental Appropriation: Requests for the continuation of a supplemental appropriation should describe the usage of the appropriation during the current fiscal year as well as narrate the reasons necessitating its continuation.

IDENTIFICATION OF OBJECTIVES AND REQUIREMENTS

NOTE: This section should only be developed for new/supplemental appropriations requested for support centers.

I. D. SECTION:

Responsibility Center Name: repeat name of center identified on front side.

Number: repeat same number.

Program/Appropriation Name: repeat name identified on the front side.

Number: repeat same number (if blank, leave blank).

GUIDELINES (FORM 30N/S) (Continued)

OBJECTIVES: An identification of the objective(s) for the new/supplemental appropriation. In general, the objective(s) identified will be the same as part or all of those described on FORM 30B for basic appropriations at the center. However, the appropriations will usually be applicable only to selected objectives.

A New Objective Should Be Identified: If the requested appropriation would result in an expansion of program services to include a new objective, the objective should be identified and labeled: (New).

ACTIVITIES: A brief and specific description of the activities which would be supported by the appropriation. See guidelines for ACTIVITIES for FORM 30B for details (Page 2-13).

INDICATORS: An identification of the indicators which would be effected by the requested appropriation and the estimated effect. However, if minimal data currently exists which is directly applicable to the indicators identified on FORM 30B, it is very likely that estimates can not be developed. In any case, the names of the indicators which would be affected should be identified.

Percentages Should Be Used for the Estimated Effect: If past indicator data is available and if the center administrator feels he can realistically estimate the effect of the requested appropriation, the estimate should be expressed as: Blank Indicators - + XX%

Indicators Should Be Developed for a New Objective: If the objective(s) identified have been labeled: (New), indicators should also be formulated. See guidelines for INDICATORS for FORM 30B for details (Page 2-13).

PERSONNEL REQUIREMENTS: An identification of personnel requested by objective. See guidelines for PERSONNEL REQUIREMENTS for FORM 30B for details (Page 2-15).

REQUEST FOR NEW/SUPPLEMENTAL APPROPRIATION

Identification Section	Responsibility Center Name		Code Number	Supplemental Appropriation/Program Name	Code Number	Date
	Prepared by	Reviewed by	☐ New Appropriation: Increased Basic			☐ District/ Division Priority
			☐ Supplemental Appropriation	☐ New Continuation		

DOCUMENTATION OF NEED FOR NEW/SUPPLEMENTAL APPROPRIATION

DO NOT FILL IN	Assigned Program:	System Priority: ☐

Form 30 N/S

Responsibility Center Name:	Number:	Supplemental Appropriation/Program Name:	Number:

IDENTIFICATION OF OBJECTIVES AND REQUIREMENTS									
Objective	Activities	Indicators	Personnel Requirements						
			Code						
			No.						

*This section should only be developed for appropriations requested for support centers.

GUIDELINES FOR DISTRICT/DIVISION SUMMARY STATEMENT
(FORM 20)

This statement should be in narrative form and should summarize the major developments of programs operating in all responsibility center types in the district/division. District statements should provide program summary information with respect to the Elementary Schools, Middle/Junior High Schools, Senior High Schools, Adult Schools, Special Schools, Non-School Instructional Centers in the district as well as the District Office. Division summary statements should provide summary information concerning those programs operating in Non-School Instructional Centers and Support Centers within the jurisdiction of the division. Program trends, including major program revisions, short range and long range projections, significant shifts in program directions or goals, should be delineated. Effects on programs due to changing administrative or curricular organizational patterns should be emphasized. Newly emerging needs and probable implications for future programs should be indicated. In each case these statements should be supported by some type of evidence; one to three pages should be sufficient for this statement.

DISTRICT/DIVISION SUMMARY STATEMENT

District/Division:	Prepared by:	Reviewed by:	Date:

District/Division:

PLANNING AND BUDGETING MANUAL

GUIDELINES FOR CAPITAL PROJECT PLANS

USAGE AND CIRCULATION: These guidelines are intended to facilitate the development of PROGRAM PLANS: CAPITAL PROJECTS 1971-72. This document will be prepared by the Physical Plant Division and will not be edited or altered by the Finance Division. The document is intended for internal information purposes and is not intended for public distribution but will, however, serve as a source of information in the development of summary plans and budget document which are intended for public distribution (See OVERVIEW OF PLANNING DOCUMENTS AND BGT REPORTS, Page 2-3).

APPLICABILITY: CAPITAL PROGRAM SUMMARY STATEMENT (FORM 10F), PROPOSED CAPITAL IMPROVEMENT PROJECTS* (FORM 10G), and ADDITIONAL CAPITAL IMPROVEMENT PROJECTS** (FORM 10H) are summary forms and apply only to capital construction included in Part III of the budget. A BUDGET REQUEST FORM should be developed for each capital improvement project which is included in the budget.

RESPONSIBILITY AND ROUTING: The Physical Plant division is responsible for completion of capital project plans. Completed plans and budget request forms should be forwarded to the Division of Finance.

*Applies to all capital improvement projects which are being included in the budget based on tentative estimates of funds that will be available for capital outlay.

**Applies to other capital improvement projects which would be seriously considered for inclusion in the budget if funds were available.

GUIDELINES FOR CAPITAL PROGRAM SUMMARY STATEMENT
(FORM 10F)

Prepared by: enter the first initial and last name of the administrator in the Physical Plant Division who is responsible for preparation of the summary.

Reviewed by: enter the first initial and last name of the Assistant Superintendent for the Physical Plant Division.

Date: enter the date on which the review was completed.

SUMMARY STATEMENT: Should be narrative in form and should focus primarily on the construction needs of the Dade County Schools. Both short-term and long-term needs should be reviewed. One to three pages should be sufficient to complete this summary statement.

The Use of Quantitative Descriptions of Need Are Desirable: Descriptions of needs should include statistical information and projections, if possible. For example, the projected number of student stations available and required over a multi-year period might be identified. If so, assumptions (e.g., ten hour days, double sessions, etc.) should be clarified.

Identification of Current Year Problems May Be Desirable: Significant problems experienced might be summarized along with plans to alleviate them.

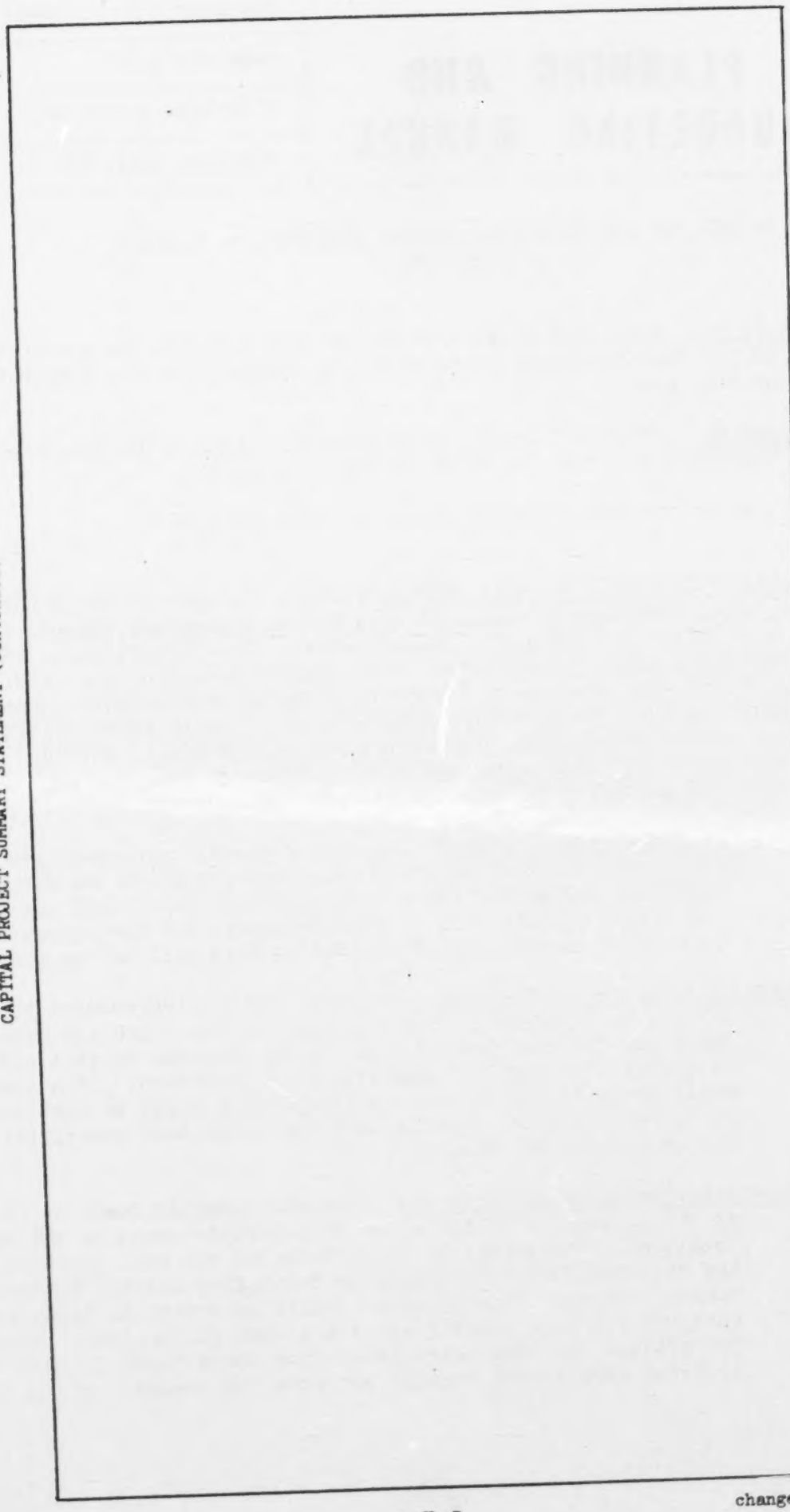
The Identification of Trends in School Construction Are Desirable: Significant trends which are under consideration should be summarized. New concepts in school construction which are planned for use in Dade County Schools should be identified.

CAPITAL PROJECT SUMMARY STATEMENT

Prepared by:	Reviewed by:	Date: / /

FORM 10F
Effective: July 1, 1971

CAPITAL PROJECT SUMMARY STATEMENT (Continued)



PLANNING AND BUDGETING MANUAL

GUIDELINES FOR PROPOSED CAPITAL IMPROVEMENT PROJECTS
(FORM 10G)

Prepared by: enter the first initial and last name of the administrator in the Physical Plant Division who is responsible for preparation of the form.

Reviewed by: enter the first initial and last name of the Assistant Superintendent for the Physical Plant Division.

Date: enter the date on which the review was completed.

PROJECT DESCRIPTION/JUSTIFICATION: Should include the name of the project and a brief description (e.g., 28 CR + 3 Kdg. elementary school) followed by a brief, but adequate, justification. The justification should document, using quantitative data whenever possible, the need for the project. For example, the justification of an elementary school might include the identification of schools to be given relief and the number of students that each is in excess of its intended capacity. Individual identification and justification of projects will only be required as specified below:

Capital Projects in Process: Includes capital improvement projects which were budgeted in prior years and for which the School Board has obligated funds. Individual projects will not be identified or justified in this category, but the agregate of their fund balances being carried forward will be reported.

Capital Projects in Planning: Includes capital improvement projects which were budgeted in prior years, but for which the School Board has not obligated funds. Major projects in this category should be individually identified and justified. If a number of small projects are in this category, they might be combined into an "other projects" listing with the individual identification and justification deleted.

Renovation/Replacement Projects: Includes budgeted funds to be used at the discretion of the district superintendents or the Building Committee. The amount of funds budgeted for each district or for the Building Committee should be identified in the "Estimated Budget" column. This category should only include funds which have not yet been identified with a specific project. If a specific project has been established from these funds it would be included with either capital projects "in process" or "in planning".

GUIDELINES (FORM 10G) (Continued)

New Capital Improvement Projects: Includes all capital projects being proposed for funding in 1971-72 based upon the estimated funds available. These projects should be individually identified and justified.

PRIORITY NUMBER: Each capital project should have a systemwide priority number indicated in this column.

DISTRICT/DIVISION: The district or division which requested each capital project should be identified in this column.

FORM 111 NUMBER: A district or division initiates a request for a capital project on a form 111. Each capital project should reference the form 111 number in this column. If a form 111 was not prepared, enter "none".

ESTIMATED BUDGET: For individually identified capital projects the estimated budget for each should be listed in this column. For capital projects which are grouped together, the agregate estimated budget for these projects should be listed in this column.

TOTAL ESTIMATED BUDGET FOR PROPOSED CAPITAL IMPROVEMENT PROJECTS: Enter the total of all amounts in the "estimated budget" column on both sides of FORM 10G.

PROPOSED CAPITAL IMPROVEMENT PROJECTS

Prepared by:	Reviewed by:	Date: / /

Project Description/Justification	Priority Number	District/Division	Form 111 Number	Estimated Budget
Capital Projects in Process	N/A	N/A	N/A	
Capital Projects in Planning				
Renovation/Replacement Projects				
Northeast District	N/A	N/A	N/A	
Northwest District	N/A	N/A	N/A	
North Central District	N/A	N/A	N/A	
South Central District	N/A	N/A	N/A	
Southwest District	N/A	N/A	N/A	
South District	N/A	N/A	N/A	
Vocational/Technical/Adult Education District	N/A	N/A	N/A	
Building Committee	N/A	N/A	N/A	

FORM 10G

Effective: July 1, 1971

PROPOSED CAPITAL IMPROVEMENT PROJECTS (Continued)

Project Description/Justification	Priority Number	District/Division	Form 111 Number	Estimated Budget
New Capital Improvement Projects				

GUIDELINES FOR PROPOSED CAPITAL IMPROVEMENT PROJECTS
(FORM 10H)

Prepared by: enter the first initial and last name of the administrator in the Physical Plant Division who is responsible for preparation of the form.

Reviewed by: enter the first initial and last name of the Assistant Superintendent for the Physical Plant Division.

Date: enter the date on which the review was completed.

PROJECT DESCRIPTION/JUSTIFICATION: List important capital projects which have high systemwide priorities and which would be seriously considered for funding if additional funds were available. Each of these projects should be individually identified by name with a brief description (e.g., 28 CR + 3 Kdg. elementary school) followed by a brief, but adequate, justification. The justification should document, using quantitative data whenever possible, the need for the project. For example, the justification of an elementary school might include identification of schools to be given relief and the number of students that each is in excess of its intended capacity.

PRIORITY NUMBER: Each capital project should have a systemwide priority number indicated in this column.

DISTRICT/DIVISION: The district or division which requested each capital project should be identified in this column.

FORM 111 NUMBER: A district or division initiates a request for a capital project on a form 111. Each capital project should reference the form 111 number in this column. If a form 111 was not prepared, enter "none".

ESTIMATED BUDGET: The estimated budget required for each capital project should be listed in this column.

ADDITIONAL CAPITAL IMPROVEMENT PROJECTS*

Prepared by:	Reviewed by:	Date: / /

Project Description/Justification	Priority Number	District/Division	Form 111 Number	Estimated Budget

*To be considered if additional funds are available.

FORM 10H
Effective: July 1, 1971

100

ADDITIONAL CAPITAL IMPROVEMENT PROJECTS* (Continued)

Project Description/Justification	Priority Number	District/Division	Form 111 Number	Estimated Budget

*To be considered if additional funds are available.

GUIDELINES FOR CONTRACTED PROJECT PLANS

USAGE AND CIRCULATION: These guidelines are intended to facilitate the development of PROGRAM PLANS: CONTRACTED PROJECTS 1971-72. Since only contracted fund balances (Part IV of the budget proposal) are reported as part of the budget cycle, it is desirable that a document be available, at least for information purposes, which contains the tentative plans and budgets of contracted activities (both funded and anticipated). This document will be a direct compilation of operational plans developed in the main by project managers. It is anticipated that these plans will not be edited or altered by the Finance Division but will be included as received. The resulting compilation of plans and budgets will serve as an internal information document during budget preparation and is not intended for public distribution. Project plans and budgets, however, will serve as source documents in the development of summary plans and the budget document which are intended for public distribution (See OVERVIEW OF PLANNING DOCUMENTS AND BGT REPORTS, Page 2-3).

APPLICABILITY: PROGRAM PLANS (FORM 10A), IDENTIFICATION OF OBJECTIVES AND REQUIREMENTS (FORM 10B), and a BUDGET REQUEST FORM* should be developed for each project (or subproject, if such a component exists) which is listed in the table of Contracted Projects (PLANNING AND BUDGETING MANUAL, Pages 4-33 and 4-34) which will be funded during the next fiscal year or for which a grant continuation has been requested. In addition, these forms should be developed for each project in the proposal stage which the Division of Instruction or the V/T/A District (proposed projects in the vocational/technical and adult areas) determines should be included in this document.

RESPONSIBILITY AND ROUTING: The district or division in which the project (if funded for the current fiscal year) is budgeted is responsible for the completion of project plans and budgets. Completed plans and budgets should be forwarded to the Division of Instruction.

*Contracted Projects should use only forms identified as: CONTRACTED APPROPRIATION: TENTATIVE. However, instructions for this form are the same as the BUDGET REQUEST FORM found on Pages 1-8.1 through 1-8.3 of the PLANNING AND BUDGETING MANUAL.

GUIDELINES FOR CONTRACTED PROJECT PLANS
(FORM 10A)

I. D. SECTION:

Contracted Appropriation Title: enter the name of the contracted project as it is listed in the table of contracted projects in the PLANNING AND BUDGETING MANUAL (Page 4-33). If a project is only in the proposal stage, enter the proposed name.

Code Number: enter the corresponding code number (four digits) from the PLANNING AND BUDGETING MANUAL (Page 4-33). Check carefully to assure that the entered number is not a carry-over number from a previous contract period. If a project is in the proposal stage only, leave blank.

Project/Subproject Name: enter the alternate name of the project or subproject if identified on the Contracted Project Assignment List. If a project does not have an alternate name, leave blank.

Prepared by: enter the first initial and last name of the administrator responsible for the preparation of the plan.

Reviewed by: enter the first initial and last name of the district/division superintendent responsible for the review of the plan.

Checked by: to be entered within the Division of Instruction.

Funded: to be checked if the project is currently funded or if funding has been confirmed for the next fiscal year. See note under Proposal Only for continuation grants.

Funding Source: enter the name of the legislation under which the project is funded, e.g., ESEA, Title I.

Beg. Date: enter the beginning date of the current grant under which the project is funded.

Term. Date: enter the termination date of the current grant.

GUIDELINES (FORM 10A) (Continued)

Proposal Only: to be checked if official confirmation of the funding of the proposed grant has not yet been received. If a project has requested a continuation grant for the next fiscal year and is currently operating under a funded grant, both the Funded and Proposal Only information should be developed.

Funding Source: enter the name of the legislation under which the grant is anticipated.

Tentative Beg. Date: enter the probable beginning date for the proposed project. If such information is not available, leave blank.

Location of Activities: check the districts in which identifiable components of the project are operating. If components of the project cannot be reasonably identified with one or more districts or if the project actually operates on a systemwide basis, Systemwide should be checked. If the project is only in the proposal stage and the particular district(s)' application has not yet been planned, To Be Determined should be checked.

SUMMARY REVIEW OF OPERATIONS: Summary information describing project operations during the current fiscal/academic year. This information should be narrative in form and should only be developed for currently operating projects.

A Specific Target Population Should Be Identified: Projects whose activities are directed at a specific target population whose characteristics can be communicated should identify that population at the beginning of this section (including an abstracted definition of relevant characteristics). The quantitative size of the population in Dade County or a particular district should also be identified, if available, as well as the percentage of the target population which is being served by the project.

Significant Achievements/Problems Should Be Highlighted: Significant achievements and problems should be readily identifiable within this section. Such information might entail both significant project outcomes or lack of desired outcomes as well as achievements or problems related to the planned usage of personnel or materiel, the location of activities, etc. Explanatory information may be added, if desired.

GUIDELINES (FORM 10A) (Continued)

Available Evaluative Data Should Be Emphasized but Abstracted: Data which is available from formal evaluative procedures describing project outcomes should be emphasized in abstracted form within this section. Such data should minimize information dealing with the sheer quantity of services, unless data describing changes in learner behavior is not available. It is desirable that evaluative data included within this section describe significant gains in achievement, significant shifts toward a desirable attitude or self concept, significant changes in student dropout rates or disruptive incidents, etc. The description of evaluative data should also be narrative in form and should minimize the use of technical jargon. Evaluative data included should be reviewed by the Department of Program Evaluation.

Evaluative Design Information Should Not Be Included: An identification of the formal evaluative procedures or statistical designs employed to obtain accurate measurement of project outcomes should not be contained within this section. It is assumed that any evaluative data which is identified within this document has only been obtained after the design of acceptable measurement procedures.

The Review of Operations Should Be Specific in Any Case: Projects for which evaluative data is not collected because of grant requirements should still contain specific information describing project operations during the current year. Such information might necessarily entail number of teachers funded, number of schools serviced, number of pupils receiving services, etc.

PROJECT SERVICE DATA: Statistical information describing the quantity and type of project services for the period from the beginning date of project funding (during the current year) until March 1, 1971.

Data Should Be Entered Within the Appropriate Service Category: The number of persons receiving service should be entered within each category of service defined on the following page with separate entries by district or systemwide. Totals should be developed by service category across district/systemwide and by district/systemwide across service categories.

GUIDELINES (FORM 10A) (Continued)

Service Category Definitions

Instructional Activities - Includes activities dealing directly with the teaching of pupils. Teaching, however, may be provided in a school classroom, in another location such as a home, or in an informal teaching situation such as co-curricular activities. A brief description of the purpose of the instructional activities, e.g., Language Development, should be entered within the blank if project services entail instructional activities. NOTE: Instructional activities involving Field Trips or for the purpose of Remedial Reading are categorized separately.

Field Trips - Includes instructional activities involving the travel of pupils from their customary school location for the purpose of broadening their experiential background.

Remedial Reading - Includes instructional activities whose primary purpose is to alleviate serious/severe reading skills/comprehension deficiencies. (See MANUAL, Page 4-44, for an expanded definition).

Pupil Personnel Services - Includes support activities typically termed Guidance/Counseling Services, Visiting Teacher Services, Psychological Services (See MANUAL, Page 4-46 and 4-47 for an expanded definition).

Staff Development - Includes support activities whose primary purpose is to improve those professional or occupational competencies of staff members necessary for their effective functioning.

Employment Opportunities - Includes activities whose primary purpose is to provide pupils with opportunities for part-time gainful employment to enable them to continue their formal education.

Health Services - Includes support services providing pupils with appropriate medical, dental, psychiatric, or nurse services.

School Food Services - Includes support activities pertaining to preparing and serving regular and incidental meals, lunches, or snacks in conjunction with project activities.

PLANNING AND BUDGETING MANUAL

GUIDELINES (FORM 10A) (Continued)

Project Services Can Be Categorized in Additional Areas: Project services which do not meet the definitions of the defined services should be separately identified within the last entry (the blank) of the table or entered within any available blank by crossing out the existing category and identifying the new category.

Service Data Should Not Be Identified for Certain Project Activities: Certain project activities, such as administration, curriculum development, etc., in which numbers of persons served is meaningless information should be excluded from this table.

Frequency of Service Should Also Be Entered: The footnotes on this form define certain frequencies or types of service. The letter identifying the appropriate type of service (e.g., A - Infrequent Service, etc. . . . . .) should be entered within the blank parenthesis of each service category in which data is contained.

Estimates of Services Should Be Developed If Data Is Not Available: Estimated service data should be entered on this form if grant requirements do not provide for the collection of service data. The availability of at least estimated service data for each project will describe more fully the total mix of contracted activities with system needs.

CONTRACTED PROJECT PLANS

Identification Section	Contracted Appropriation Title	Code Number	Project/Subproject Name
	Prepared by:	Reviewed by:	Checked by:
	Funded: ☐	Funding Source:	Beg. Date: / /	Term. Date: / /
	Proposal Only: ☐	Anticipated Funding Source:	Tentative Beg. Date: / /
	Location of Activities: ☐ NE ☐ NW ☐ NC ☐ SC ☐ SW ☐ S ☐ VTA ☐ Systemwide ☐ To Be Determined		

Summary Review of Operations

DO NOT FILL IN	Assigned Program:

change no: 1
2-46

FORM 10A
Effective: July 1, 1971

Project Service Data									
Service Category	NE District	NW District	NC District	SC District	SW District	S District	V/T/A District	Systemwide	Total
_____ Instructional Activities ( )									
_____ Instructional Activities ( )									
_____ Instructional Activities ( )									
Field Trips ( )									
Remedial-Reading ( )									
Pupil Personnel Services ( )									
Staff Development ( )									
Employment Opportunities ( )									
Health Services ( )									
School Food Services ( )									
_____ ( )									
_____ ( )									
Total									

A-Infrequent Service: number of persons receiving/participating in the service on a one-time basis or less than an average of once a week.

B-Frequent Service: number of persons receiving/participating in the service on an average of once a week but not on a daily basis.

C-Daily Service: number of persons receiving/participating in the service on a daily basis.

D-Regular Service (frequency not relevant): number of persons receiving/participating in the service as needed with no reasonable delay.

E-Service data cannot be identified within categories, A, B, C, or D.

F-Estimate only: service data not available.

GUIDELINES FOR IDENTIFICATION OF OBJECTIVES AND REQUIREMENTS
(FORM 10B)

I. D. SECTION:

Appropriation Title: enter the title of the contracted project, if currently funded, as identified in the table of contracted projects, MANUAL (Pages 4-33 and 4-34). If a proposal only, enter the proposed title.

Code Number: enter the code number (four digits) of the contracted project (if funded) as identified in the MANUAL (Pages 4-33 and 4-34). If a proposal only, leave blank.

Project/Subproject Name: enter the alternate name of the contracted project if identified on the Project Assignment Sheet.

OBJECTIVES: Identification of the specific purpose(s) of the project for the next fiscal/academic year. These objectives should in the main be the same as those identified in the project proposal or grant continuation proposal. However, if the grant does not require a statement of objectives, objectives should be developed for this document.

Objectives Should Clearly and Concisely Communicate the Specific Purpose(s) of the Project: Objectives as stated should be clear and concise and reflect the purposes of the particular project. Objectives should not be at the level of generality of the aims of education but should be specific to the project given the limitation of the types and quantity of resources available as well as its time duration.

Objectives Should Describe Project Outcomes and Not Activities: Objectives as stated should represent the outcomes or aims of the project which will be attained by project activities. Statements such as: "To individualize instruction: or "To increase the application of team teaching" should generally not be considered statements of project outcomes but descriptions of patterns of project activities.

GUIDELINES (FORM 10B) (Continued)

Objectives Should Be Measurable Through Indicators: Objectives developed within this section should be brief and specific. The potential for measuring the degree of attainment of a stated objective will be identified in the INDICATORS section. Objectives should be so stated that their relationship to their identified INDICATORS can be easily understood.

The "Other" Objective May Be Used: Project planners may wish to group a series of minor project services or outcomes in an "other" objective after they have identified the major purposes of the project. Such an objective might be worded: "To develop other necessary skills (skill name, skill name, skill name)".

The Objectives of Administrative Activities Should Also Be Grouped or Omitted: Projects with identifiable administrative activities may choose to omit objectives for these activities and include them within project objectives or develop a single objective pertaining only to administrative activities. Generally, it will only be advisable to develop such an objective in projects with substantial administrative activities.

A Limited Number of Objectives Should Be Identified: The number of objectives developed within any one project or subproject plan should be limited to five or less. This may be accomplished by combining more detailed statements of objectives into a more general level, by use of the "other" objective, or by use of an "administrative" objective.

INDICATORS: Measurement situations which facilitate an adequate report of the degree of attainment of each objective. This section should not be developed unless the grant under which the project is funded or potentially funded requires evaluative procedures/criteria. However, this section should not be just left blank but a phrase such as: "Evaluative procedures not required" should be entered. If evaluative criteria/procedures are required for the project, project planners must develop this section in cooperation with the assigned staff evaluator(s) of the Program Evaluation Department.

GUIDELINES (FORM 10B) (Continued)

Indicators as Stated Should Follow the Guidelines of the Grant: The specifications for the identification of evaluative procedures of the grant funding or potentially funding the project should be followed. This may entail an identification of the sources of data, such as standardized achievement tests, attitude surveys or an identification of the statistical designs to be employed, etc.

The Statement of Indicators Should Be Brief: Indicators as stated should abstract from a detailed statement of evaluative procedures and present only a summarized version.

A Limited Number of Indicators Should Be Identified: The number of evaluative criteria identified should be less than five. Projects with an extensive listing of evaluative criteria should include only the most relevant of measurements by objective or should include within this section a reference identifying the name of the document (and page numbers) where a complete listing of evaluative procedures may be found.

PERSONNEL REQUIREMENTS: The personnel required to attain each objective. All personnel should be included (including part-time and overtime) which are listed on the Contracted Budget Form. The identification of the planned usage of personnel should better communicate the project plan.

Code: Each BPI account code included within the Contracted Budget Form should be identified within this section with all employees with the same account code grouped as a single entry. Part-time or overtime employees should be grouped with the regular account code.

No.: The total number of employees within any one account should be grouped as a single entry within this block.

Several Account Codes May Be Grouped Into A Single Entry: Most project planners will find that the form as designed (six available account code entries) is sufficient. However, projects with a large number of personnel budgeted should group these accounts into the following categories and use the code number (state account code) identified below:

GUIDELINES (FORM 10B) (Continued)

CATEGORY CODE	B.P.I. ACCOUNT CODE
2014	2014.10, 2014.00
2110	2112.00, 2113.00, 2115.00
2211	2211.10, 2211.00
2214	2214.30, 2214.40, 2214.50, 2214.60, 2214.90

Account Codes for Project Clients Should Be Entered: Salary accounts which actually represent project clients rather than project personnel, e.g., part-time accounts in the Neighborhood Youth Corps, should still be entered. However, they should not be grouped with other accounts.

Percentages Should Be Used for the Estimation: Estimates of personnel requirements by objective should be expressed in percentages. A single account code entry (including part-time and overtime) should be treated as a whole with a single percentage entered in the appropriation column adjacent to the applicable objective. Employees within a single account code who are utilized to meet different objectives may be estimated as a single unit or averaged percentagewise using the formula:

$$\frac{A\% + B\% + C\%}{\text{No. Emp.}}$$

in which A + B + C = individual employees.

In all cases, the total of entered percentages should not exceed 100%.

Methods of Determining Estimates Depend Upon the Degree of Replanning: Since projects are substantially replanned for each grant continuation, many project planners will find that the development of this section is largely dependent upon their assignment (as part of the plan) of personnel to meet objectives. However, some projects will find that past assignment of personnel is also useful for developing this

GUIDELINES (FORM 10B) (Continued)

section. In this case, they may find it practical to use past experience, coupled with planned changes, as a basis for the estimates. In addition, if the work force is large and activities occur at many locations, project planners may find it necessary to circulate an informal survey among employees specifying the objectives, requesting employees to identify the proportion of time which will be expended on each objective, and compiling the result.

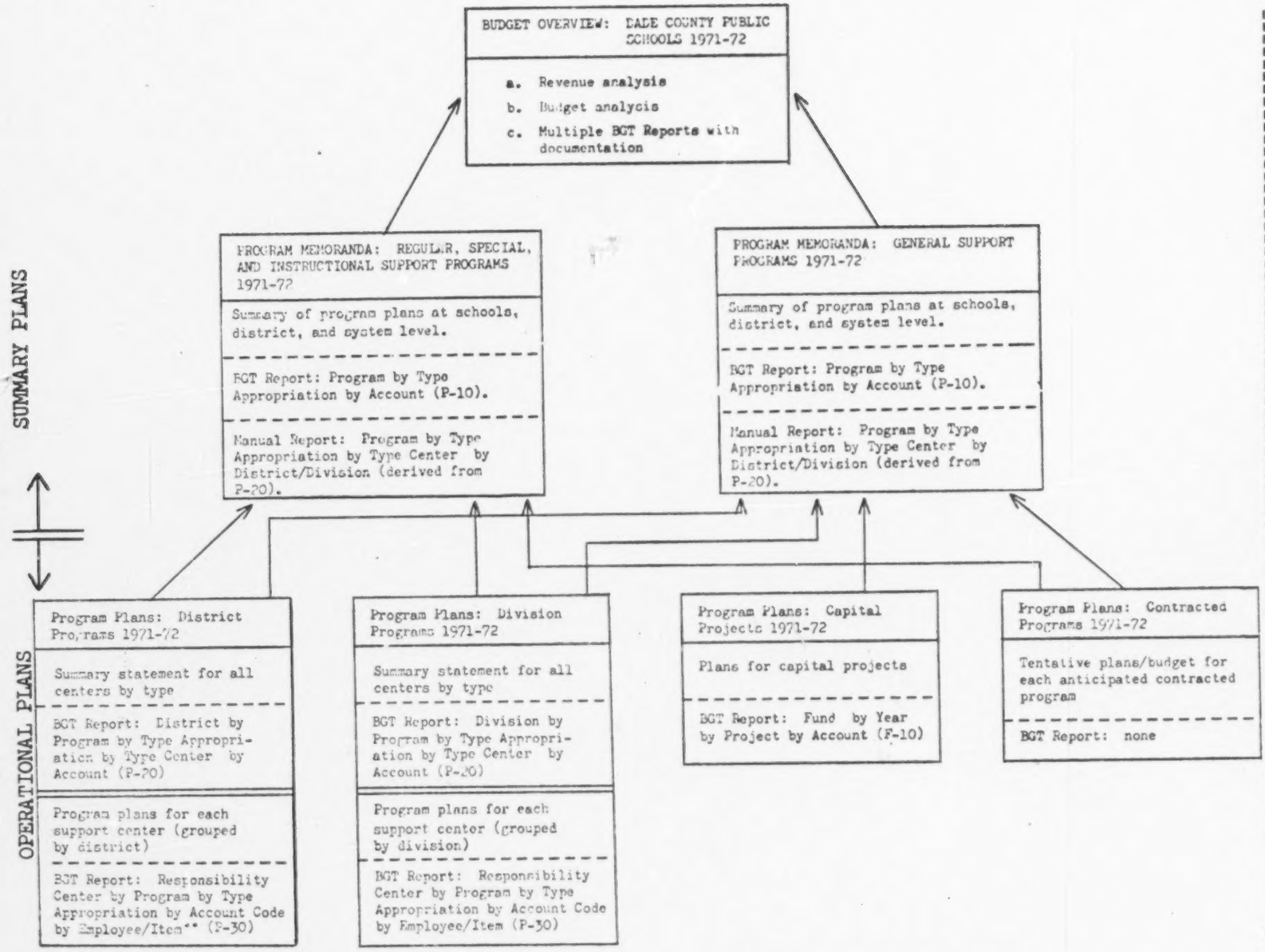
Reasonable Estimates May Be Impractical for Proposals: Since many projects in the proposal stage have not been planned to the point of determining the assignment of personnel to meet objectives, plans for "Proposal Only" projects may exclude this section. In this event, a phrase such as: "Not Available" should be entered.

SPACING OF OBJECTIVES/INDICATORS/REQUIREMENTS: A set of an objective, indicators, requirements should generally require an entire side of this form. However, if two such sets can be entered on one side, a double line between the two identified objective sets should be typed.

PLANNING DOCUMENTS

DOCUMENTS	DESCRIPTION
BUDGET OVERVIEW: DADE COUNTY PUBLIC SCHOOLS 1971-72	The budget document. A document suitable for public distribution which describes the types and quantity of revenues used in funding school system programs, analyzes significant changes in budgetary appropriations systemwide, and summarizes budgetary decisions by program, account, and responsibility center.
PROGRAM MEMORANDA: REGULAR, SPECIAL, AND INSTRUCTIONAL SUPPORT PROGRAMS 1971-72	A summary planning document suitable for public distribution which summarizes budgetary decisions by program, whether at school, district, or division level. Estimated program appropriations which are funded through Part IV will be included as well as appropriations funded by internal funds in the Occupational and Continuing Instruction programs.
PROGRAM MEMORANDA: GENERAL SUPPORT PROGRAMS 1971-72	A summary planning document suitable for public distribution which summarizes budgetary decisions by program (non-instructional) whether at school, district, or division level. Estimated program appropriations funded through Part IV will be included as well as internal funds supporting the School Food program. Proposed capital projects will be summarized within the Facilities Support section.
PROGRAM PLANS: DISTRICT AND DIVISION PROGRAMS 1971-72	An operational planning document for internal use developed at the support center level which identifies planned objectives, resources necessary to accomplish objectives, past year accomplishments and problems, plans to resolve problem areas, and needs for additional funds. In addition, each district/division will submit a summary statement describing significant achievements, both past and planned, for all centers summarized by type.
PROGRAM PLANS: CAPITAL PROJECTS 1971-72	An operational planning document for internal use which describes in detail facilities needs during the next year and over a multi-year period as well as each capital project currently underway.
PROGRAM PLANS: CONTRACTED PROJECTS 1971-72	An operational planning document for internal use which identifies the planned objectives for each probable and funded contracted project, resources necessary for those objectives, and the funding source.

OVERVIEW OF PLANNING DOCUMENTS AND BGT REPORTS*


BUDGET OVERVIEW: DADE COUNTY PUBLIC SCHOOLS 1971-72
a. Revenue analysis
b. Budget analysis
c. Multiple BGT Reports with documentation
PROGRAM MEMORANDA: REGULAR, SPECIAL, AND INSTRUCTIONAL SUPPORT PROGRAMS 1971-72
Summary of program plans at schools, district, and system level.
BGT Report: Program by Type Appropriation by Account (P-10).
Manual Report: Program by Type Appropriation by Type Center by District/Division (derived from P-20).
PROGRAM MEMORANDA: GENERAL SUPPORT PROGRAMS 1971-72
Summary of program plans at schools, district, and system level.
BGT Report: Program by Type Appropriation by Account (P-10).
Manual Report: Program by Type Appropriation by Type Center by District/Division (derived from P-20).
SUMMARY PLANS
OPERATIONAL PLANS
Program Plans: District Programs 1971-72
Summary statement for all centers by type
BGT Report: District by Program by Type Appropriation by Type Center by Account (P-20)
Program plans for each support center (grouped by district)
BGT Report: Responsibility Center by Program by Type Appropriation by Account Code by Employee/Item** (P-30)
Program Plans: Division Programs 1971-72
Summary statement for all centers by type
BGT Report: Division by Program by Type Appropriation by Type Center by Account (P-20)
Program plans for each support center (grouped by division)
BGT Report: Responsibility Center by Program by Type Appropriation by Account Code by Employee/Item (P-30)
Program Plans: Capital Projects 1971-72
Plans for capital projects
BGT Report: Fund by Year by Project by Account (F-10)
Program Plans: Contracted Programs 1971-72
Tentative plans/budget for each anticipated contracted program
BGT Report: none

*Non-Programmed Costs, e.g., Part II, employee benefits, contingency funds, are only included in the BUDGET OVERVIEW.

**Employee/Item for support centers only with the exception of the V/T/A District: all centers.

2/5/71

CHAPTER IV

CONCLUSION

Project Summary

It should be emphasized that the materials included in this report represent an intermediate stage in the development of a PPBE System in Dade County Schools. The Dade County project objectives

1. Development of a design for program planning-budgeting-evaluating for the Dade County School System.

2. Implementation of the program planning-budgeting-evaluating system.

have been accomplished as described elsewhere in this report. It should also be pointed out that the program planning and budgeting methodology incorporated in the management practices of the school district during 1970-71 were done so within an overall planning/budgeting framework that includes responsibility center and object code emphases. Accordingly, the PPBE System design consists of program planning and budgeting components of a larger system as described in the Planning and Budgeting Manual.

Future Developments

PPBES implementation in the preparation of the 1971-72 budget included program budgeting at all responsibility centers and program planning at support centers. Plans for 1971-72 include (1) the refinement of those procedures implemented, (2) the revision and expansion of the current accounting system to provide program expenditure data according to the same structure as the program budget, (3) the establishment of initial evaluative procedures through voluntary collection and reporting of indicator data (mandatory in 1972-73), and (4) the revision of operational and summary planning documents to better satisfy the needs of various levels of management.

A major problem in implementing PPBES in a large school district stems from the number of persons who are potential users of PPBES and who must eventually be trained in the methodology if the system is to be realized to its full potential. Although significant progress has been made in Dade County Schools in the area of in-service training for administrative personnel a substantial task in this area lies ahead.

Concluding Remarks

While the anticipated revision of Handbook II will no doubt provide a great stimulus to PPB development in school districts throughout the country, the system within any particular district cannot be a canned version developed on a one-shot basis.

The development and installation of PPBES methodology in local school districts must be considered a continuing in-house effort in which the procedures and controls underlying the system are progressively revised and refined to reflect the necessary system specifications at one point in the history of a particular educational organization.

It is imperative that school districts moving to install a PPBE System adopt a multi-year outlook with respect to progress with the understanding that proper utilization of such a system will most likely not occur until several years after development is begun.

APPENDIX A

PERSONNEL DIVISION PROGRAM MEMORANDUM, 1970-71

PHYSICAL PLANT DIVISION PROGRAM MEMORANDUM, 1970-71

PERSONNEL

PROGRAM PLANNING DOCUMENT

FOR

FISCAL YEAR 1970-71

SUMMARY REVIEW OF OPERATIONS 1969-70

During 1969-70 the personnel records of approximately 25000 active employees were converted from an alphabetical file system to a terminal digit numeric open shelf system. The new system provides greater accessibility to files, more expeditious processing of material to be retained in file jackets, and has resulted in an improved service for all concerned.

Under a contractual agreement with the Remington Rand Corporation the personnel records of approximately 55000 inactive employees were placed on microfilm, indexed, and a film locator card file established. The establishment of this microfilm file provides a more effective and efficient means of administering and processing requests for information as regards former employees. Additionally, personnel and equipment is now provided within the department for microfilming personnel records as the employee terminates.

Still undergoing feasibility testing is the use of the Sanders Cathode Ray Terminals. This system, if proven satisfactory, will provide an instantaneous communications link with the computer equipment at Central Data Processing and will serve to reduce processing time for personnel actions, permit expeditious inquiry from the master record unit and will eventually permit instantaneous upgrading of data in the computer system.

Noteworthy also are the procedural changes that have been made in the certification section. Through additional use of computer products and the improvement of monitoring procedures a more satisfactory method has been established for processing certificate information and keeping members of the instructional staff informed relative to the status of their teaching certificates. Efforts being made in this area should result in fewer employees being terminated because of certificate deficiencies.

The faculty desegregation court order had an appreciable impact within the department. Many additional man hours in excess of the normal load were expanded relocating approximately 1800 teachers plus a large number of teacher aides and filling vacancies created by resignations associated with the court order. The opening of several new elementary schools as well as the constantly changing patterns of special programs also required special attention.

In the area of wage and salary administration an entirely revamped salary handbook was produced along with a complete reorganization of the occupational code series and establishment of centralized assignment of all occupational codes. Inroads are being made in the development of a county-wide staffing document.

The augmentation of the clerical staff through the addition of eleven clerical positions served to eliminate to a large degree the need for temporary employees during 1969-70 and should result in improved skill levels and work quality. However, the absence of adequate office space to satisfactorily accommodate the needs of the personnel staff has been and continues to be a critical deficiency adversely affecting the overall effectiveness and efficiency of the department.

SUMMARY OF PLANS FOR FISCAL YEAR 1970-71

Program Description

This program includes the recruitment and placement of all school personnel, the maintaining of the credentials, personnel records information and other necessary certifications for school personnel, the orientation of new personnel, maintaining contact with institutions preparing school personnel, and the assignment and reappointment of school personnel. Another important activity is the preparation of personnel policies for the school system. The selection of staff to provide the educational programs of the school system is one of the most important aspects of planning; administrative leaders at the school, district, and county levels are involved in this process.

Highlights of Program Plans

- A detailed listing of all authorized administrative and clerical positions will be produced by Administrative Staff and Non-Instructional staffing.

- A desirable racial balance in individual Dade County Schools will be maintained.

- The college recruitment plan will be revised to reflect system staffing priorities as well to delete areas in which minimal hires have occurred in the past.

- The number of part-time positions will continue to be reduced reflecting the use of a greater number of fulltime employees as well as greater use of automation.

- Data reflecting the achievement of sub-program objectives will be collected during the fiscal year and will be documented with expenditure information in a Program Report at the middle and end of the fiscal year.

Program Budget

Sub-program	Number Employees	Basic Budget
Personnel Management	2	34,084
Personnel Policy Development and Administrative Staffing	2	41,230
Instructional Staffing	18	179,462
Non-Instructional Staffing	6	59,088
Personnel Operations/Records	47	339,623
TOTAL: Personnel Program	75	653,487

Personnel Management

PROPOSED PLANS
Management activities of the Personnel Program, conducted by the Assistant Superintendent for Personnel, will include the direction, coordination and evaluation of instructional and non-instructional staffing, policy development and administrative staffing, and the operations/records department.

PROPOSED BUDGET

Account Code	BASIC BUDGET		PROPOSED INCREASE		EXPANDED BUDGET	
	No. Emp.	Amount	No. Emp.	Amount	No. Emp.	Amount
2014.00	2	33,884			2	33,884
2014.06		200				200
TOTALS	2	34,084			2	34,084

Personnel Policy Development and Administrative Staffing

OBJECTIVES	INDICATORS
To develop personnel staffing policies that will insure equal consideration of all qualified applicants and selection of the best qualified applicant.	Number of policies revised, submitted to the Board of Public Instruction, and approved
To revise the Handbook of Instructional and Clerical Allocations to schools and district offices and prepare a consolidated report of staffing each school year.	A revised regular handbook A handbook for an alternate plan of staffing A consolidated report of instructional and clerical staffing in schools and district offices
To develop personnel policies for the selection of persons to fill administrative positions, i.e., coordinators, supervisors, directors, principals, and assistant principals.	Proposed policies for selection of persons to fill administrative positions approved by the Board
To provide the services necessary for the identification and selection of qualified administrators for staff positions.	Number of positions advertised Number of applications reviewed Number of interviews conducted Number of positions filled

PROPOSED PLANS

The major proportion of this sub-program's activities are directed toward facilitating the identification and selection of administrators, both instructional and non-instructional. During the past fiscal year, a major revision of these policies and procedures was accomplished. These changes, which were particularly far-reaching in regard to principalships and assistant principalships, have resulted in the establishment of a screening committee and interview committee for each administrative position, rather than the development of any kind of system-wide pool. These changes have resulted in an individualizing of administrative staffing in terms of the particular characteristics of each school. It is anticipated that these revised policies and procedures will be continued during the next fiscal year.

A revised list of authorized administrative positions will be produced by this sub-program during the next year in collaboration with Non-Instructional Staffing.

Continued emphasis will again be placed on the development and revision of those personnel policies which are necessary for the school system in a changing environment. The use of the Alternate Staffing Handbook by certain districts and schools will be carefully monitored. It is anticipated that the option for an alternate set of staffing formulas will be extended during the next fiscal year.

PROPOSED BUDGET

Account Code	BASIC BUDGET		PROPOSED INCREASE		EXPANDED BUDGET	
	No. Emp.	Amount	No. Emp.	Amount	No. Emp.	Amount
2014.00	2	24,750				
2014.03	-	3,680				
2014.06	-	300				
2034.10	-	7,500				
2034.28	-	5,000				
TOTALS:	2	41,230				

Instructional Staffing

OBJECTIVES	INDICATORS
To provide the instructional staff (teachers) for the school system.	Number of positions filled by new teachers for the opening of school during the year by month Number of new teachers teaching out of field by teaching area Percentage of total instructional staff teaching out of field by teaching area Number of applicants interviewed on college campuses and subsequently hired Number of applicants interviewed in the Personnel Office Number of reassignment applications processed Number of positions filled by reassignment
To provide substitute teachers for the schools.	Average number of persons registered to perform substitute teaching per month Number of requests by principals for assistance in securing substitutes per month Percentage of principals' requests for substitute filled within two teaching days by month
To provide counseling services for teachers with regard to evaluation, continuing employment, reassignment, dismissal and certification.	Number of teachers requesting conferences to review evaluation and personnel folders Number of conferences held relating to reassignment Number of conferences held in reference to certification Number of conferences held with teachers who were not reappointed and/or their principals Total number of conferences held with teachers in providing counseling services

PROPOSED PLANS

Provision for Necessary Fulltime Staff: The activities of the Instructional Staffing sub-program during the next fiscal year will be principally directed at the first sub-program objective, that of providing the quantity and quality of fulltime instructional staff which is necessary in an expanding school system. In addition to meeting State Department of Education regulations and accreditation standards, staffing efforts will be further complicated by the need to maintain a desirable racial balance within the schools as well as meeting needs for teachers with specialized training in addition to subject matter, e.g., capacity to function effectively with disadvantaged youth. Staffing activities currently involve both a series of clerical and application monitoring procedures (fingerprinting, certificate, references, transcript check) as well as a professional evaluation of each candidate in terms of the needs of the school system (see SEQUENCE OF NEW INSTRUCTIONAL STAFFING ACTIVITIES -- **See Appendix A**). A staff of four instructional recruiters, two typists, a receptionist, a file clerk, a fingerprint clerk and assistant are now assigned to facilitate the hiring of an estimated fifteen hundred teachers for the opening of the 1970-71 academic year.

These onsite applicant review and evaluation procedures will be supplemented by an external recruitment program. Although a detailed recruitment plan is not available at this time (the plan is customarily developed during the late summer), it is anticipated that the development of the schedule of colleges and universities to be visited in recruiting for the 1971-72 academic year will be determined by three major criteria: an identification of the school system's priority needs for certain specialized teacher training, the availability of certain critical teaching areas, and past data relating to actual hires from particular colleges and universities. Data is being collected during this year's opening of school staffing efforts describing actual hires from the college visitation program. It is anticipated that over 200 colleges and universities will again be visited during the next year with careful scheduling procedures employed to insure maximal visitation during any one recruiting trip. Fifteen thousand dollars out of county travel

funds are proposed to fund this activity. In terms of personnel involved, this activity will consume approximately eight weeks of the four instructional recruiters' time as well as ten to fifteen instructional administrators for a duration of one week each. In addition to campus visitations, recruitment literatures and application forms will be distributed to all colleges and universities active in this effort in the past as well as providing representatives at a limited number of teaching area conventions and college career days. It is impossible at this time to determine accurately the actual contribution the external recruitment program provides in terms of numbers and types of instructional staff hired. Efforts will be made during this year to better assess the contributions of these activities.

In addition to providing new instructional staff, this sub-program will again facilitate the reassignment of currently employed personnel. Although these activities are primarily a clerical operation, control will be maintained to insure that a desirable racial balance of both sending and receiving schools is continued while still attempting to meet the particular needs of teachers desiring transfers.

Provision for Substitutes: A register of substitutes will again be established at the beginning of the academic year and updated monthly to reflect both additions and deletions of available substitutes. School principals will be forwarded copies of this register on a monthly basis. Individual assistance will again be provided for those principals who are unable to obtain substitutes by using the register. Two clerks are employed fulltime for this activity.

Teacher Counseling Services: Providing an adequate teaching staff for a large school system invariably requires that a variety of miscellaneous services be offered. This is necessary not only for the morale of the staff but to minimize the loss to the system of experienced teachers because of certification difficulties or personnel problems which are resolvable. It is impossible to determine the amount of sub-program resources which are directed at this objective since most of the activities are somewhat seasonal and on an ad hoc basis.

Instructional Staffing (cont'd)

PROPOSED BUDGET						
Account Code	BASIC BUDGET		PROPOSED INCREASE		EXPANDED BUDGET	
	No. Emp.	Amount	No. Emp.	Amount	No. Emp.	Amount
2014.00	18	159,462				
2014.03	-	1,200				
2014.06	-	800				
2034.20	-	3,000				
2034.28	-	15,000				
TOTALS	18	179,462				

Non-Instructional Staffing

OBJECTIVES	INDICATORS
To provide the non-instructional staff (not including administrators) for the school system.	Total number of vacancies in each job classification each month Average number of days required to fill non-instructional positions in each classification each month Total number of full-time personnel hired each month Total number of temporary personnel hired each month
To provide for recruitment of applicants for non-instructional positions.	Total number of advertisements published each month Total number of persons responding to advertisements each month Percentage of total number of applicants who are screened through interviews and tests each month

Non-Instructional Staffing (cont'd)

OBJECTIVES	INDICATORS
To maintain adequate salary schedules and publish the Dade County Schools' Salary Handbook.	Total number of classification (pay grade) changes adopted (related to all salary schedules) as a result of various surveys Date of published salary handbook
To maintain equity of the Unified Classification Plan and provide adequate salaries in support of the Non-Instructional Staffing function.	Total number of new positions established Total number of reclassification requests Total number of reclassifications recommended Total number of positions reclassified
To produce a document which describes the authorized budgeted non-instructional personnel in each administrative department.	Date of availability of document Report indicating comparison of authorized/actual non-instructional staff in each department

PROPOSED PLANS

The primary function of the Non-Instructional Staffing program continues to be providing for the hiring of non-instructional personnel and the maintenance of the Unified Classification and Pay Plan. Six employees (two supervisory and four clerical) are authorized and budgeted for the 1970-71 school year.

A file of applicants for non-instructional positions is maintained. When a work location informs personnel of a job vacancy, suitable applicants on file are contacted and interviews arranged. If none of these applicants are hired, then personnel inquires of the Florida State Employment Service, local business colleges, the Adult/Vocational division, and similar organizations about qualified applicants. If these sources fail, then a newspaper advertisement may be run.

Presently, Personnel is usually notified of a job vacancy by telephone and itself fills out the prescribed forms. It is planned that all work locations will be provided these forms which they will then complete and forward to Personnel.

Clerical applicants are screened by the administration of a standardized clerical tests and appropriate performance tests as well as by interview.

Non-Instructional Staffing - Proposed Plans (cont'd)

Non-Instructional Staffing also has responsibility for preparing recommendations regarding the non-instructional salary structure. The main basis for these recommendations is a review of salaries for comparable jobs both locally and nationally. The main sources of this information are the Tri-County Survey which includes data from many of the governmental units in Dade, Broward and Palm Beach counties; Bureau of Labor Statistics for the Miami Metropolitan Area; and the Bureau of Labor Statistics National Professional, Technical and Clerical Survey.

Another responsibility of this program is to recommend the pay grade of new positions and reclassifications of existing positions. To accomplish this objective a job audit is performed to establish an accurate job description which is then compared to other similar jobs within the school system in order to maintain the equity of the Unified Pay Plan.

Finally, a document is being planned which will report for each work location the number of authorized, full-time positions by account codes and job position codes (which are presently being updated).

PROPOSED BUDGET

Account Code	BASIC BUDGET		PROPOSED INCREASE		EXPANDED BUDGET	
	No. Emp.	Amount	No. Emp.	Amount	No. Emp.	Amount
2014.00	6	55,218			6	55,218
2014.03	-	800* 2,070			-	2,870
2014.06	-	1,000			-	1,000
TOTALS	6	59,088			6	59,088

Personnel Operations/Records

OBJECTIVES	INDICATORS
To maintain an updated master record for all employees.	Total number of employees fingerprinted and photographed each month Total number of paychecks which were not issued on the scheduled pay date Total number of new records created Total number of personnel record changes processed during the six month period

Personnel Operations/Records (cont'd)

OBJECTIVES	INDICATORS
To provide a personnel record information center.	Total number of active personnel files presently being maintained Total number of inactive personnel files presently being maintained Total number of inactive personnel files created
To provide essential personnel services regarding retiring employees, credit references, draft deferments, subpoenas, requests for leave and temporary duty.	Total number of applications for retirement processed Total number of credit references prepared each month Total number of draft deferment letters prepared Total number of subpoena responses prepared
To provide administrative support for all activities of the personnel department including processing of requisitions, processing of new employees and budget preparation.	Total number of requistions processed each month.

PROPOSED PLANS

The Personnel Operations/Records sub-program has an authorization of 49 full-time employees: 45 clerical and four supervisory. Two of the clerical positions are federally funded. Appendix B shows the approximate deployment of these employees. The halves indicate that some employees split their time between activities.

During the fiscal year ending June 30, 1970, much of the effort was directed toward improving systems and procedures. Presently being studied is the feasibility of using Saunder's Cathode Ray Terminals (CRT's) to facilitate changes to the employee master records. If feasible, the terminals will make instantaneous record changes possible. Appendix C is a flow chart showing how employee master records are presently created or changed.

Personnel Operations/Records - Proposed Plans (cont'd)

Within the personnel records information center, a conversion was completed from an alphabetical filing system to a terminal digit numeric open shelf system, which makes it much easier to locate misfilled records. This filing system also provides more rapid access to the more than 25,000 active employee files. Records of approximately 55,000 terminated employees were microfilmed under a contracted agreement with the Remington Rand Corporation. Current plans provide that as employees are terminated, their records will be microfilmed using facilities available within the department. Further plans call for reducing the use of part-time employees in favor of full-time personnel. This should result in increased employee skills. Finally, emphasis on written requests for credit references is allowing for more efficient utilization of employees by reducing the number of interruptions..

More extensive use of standardized forms and letters is being made as a means of efficiently providing certain personnel services.

PROPOSED BUDGET

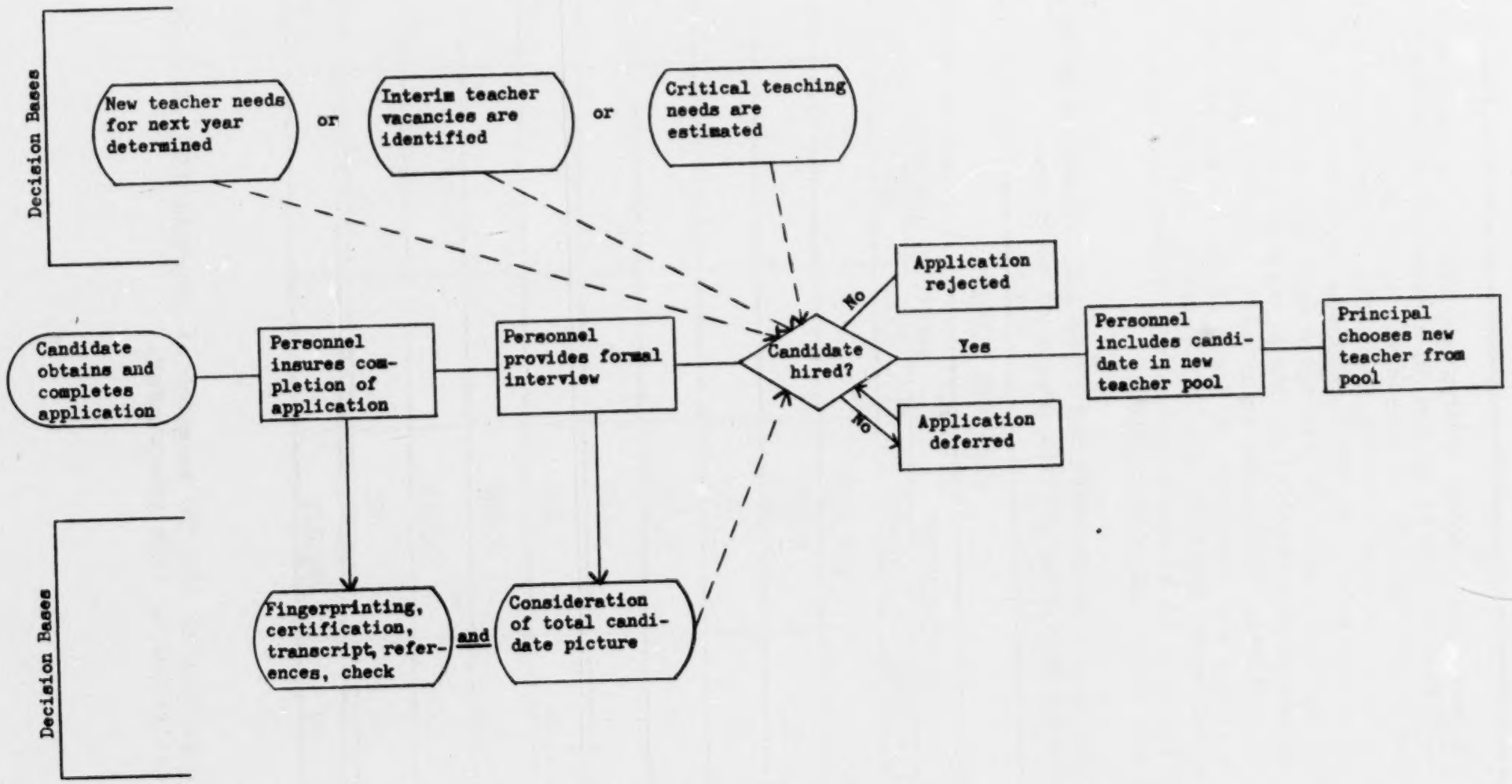
Account Code	BASIC BUDGET		PROPOSED INCREASE		EXPANDED BUDGET	
	No. Emp.	Amount	No. Emp.	Amount	No. Emp.	Amount
2014.00	47	294,477			47	294,477
2014.03	--	6,820* 2,070			--	8,890
2014.06	--	7,700			--	7,700
2034.10	--	7,600			--	7,600
2034.20	--	13,120			--	13,120
2034.27	--	200			--	200
2542.00	--	6,000			--	6,000
2844.01	--	1,111			--	1,111
2854.01	--	525			--	525
TOTALS	47	339,623			47	339,623

*Estimated portion of $12,500 budgeted at location 9311 which will be used for the activities of this sub-program.

APPENDIX A

SEQUENCE OF NEW INSTRUCTIONAL STAFFING ACTIVITIES

(Supplemented by External Recruitment Program)



APPENDIX B

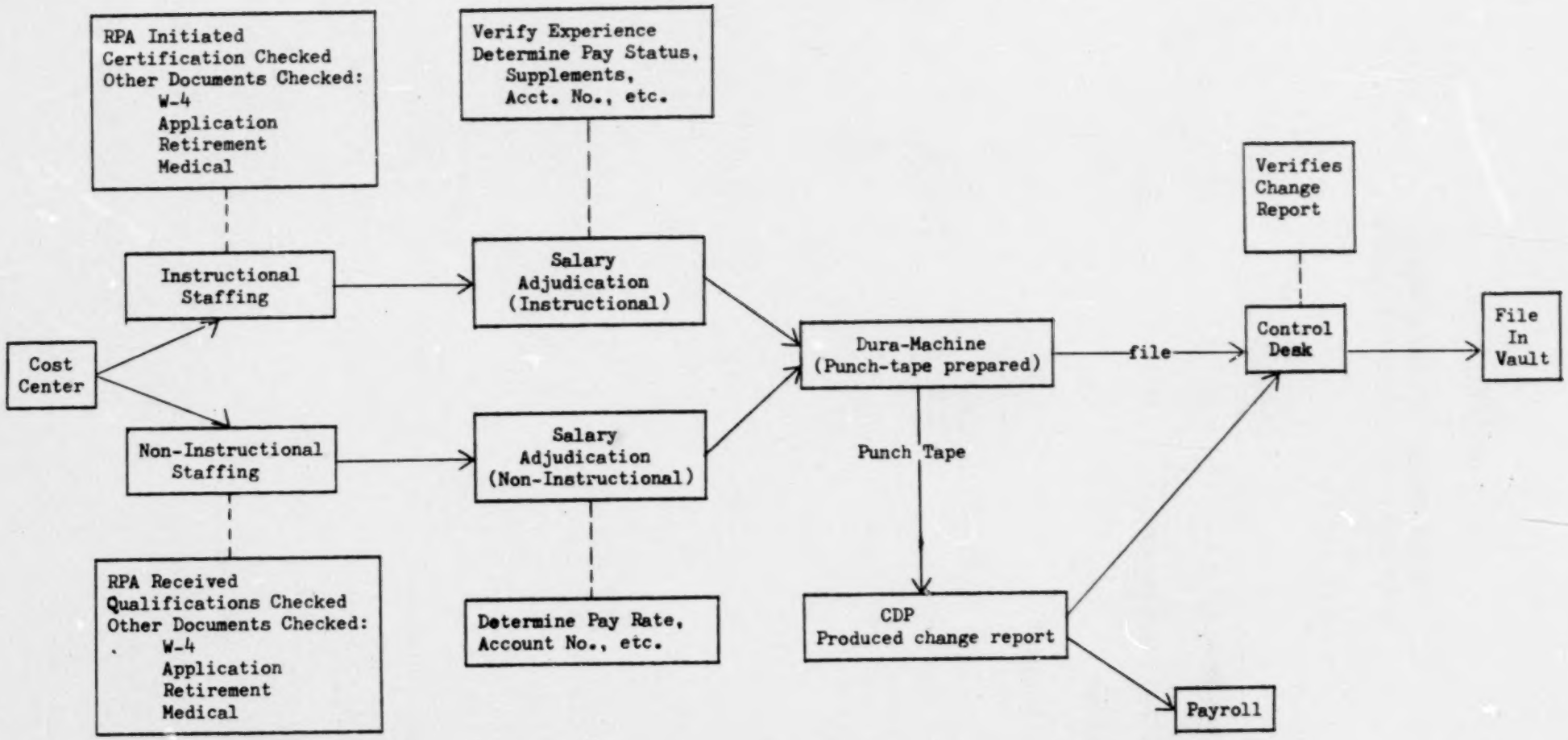
UTILIZATION OF EMPLOYEES
PERSONNEL OPERATIONS/RECORDS

	Total	Clerks	Supervisors
Personnel Master Record	29	28	1
Personnel Information Center	10½	10	½
Personnel Services	4	3	1
Administrative Support	5½	4	1½
	49	45	4

APPENDIX C

FLOW CHART - EMPLOYEE MASTER RECORD PROCEDURES (NEW & REHIRED EMPLOYEES)

PERSONNEL OPERATIONS/RECORDS



NOTE: RPA's which change the status of an existing employee follow the same route except that they are sent to the "change desk" instead of the "Dura-Machine" and change cards are sent to CDP.

PHYSICAL PLANT DEPARTMENT

PROGRAM MEMORANDUM

FOR

FISCAL YEAR 1970-71

SUMMARY REVIEW OF OPERATIONS 1969-70

The Physical Plant Program responsibility was increased during the year by the addition of 66 kindergarten buildings, 8 elementary schools, and 6 major additions to existing facilities, increasing the total number of facilities to 250. The total budget for administration of the program, maintenance of the facilities, administration of operations, plant planning and security, exceeded 6.1 million dollars. In addition, over 22 million dollars was spent on construction, renovation and site purchases and improvements.

During this year, over 50 million dollars worth of construction was either in the planning or constructipn phase, and contracts have been awarded for the construction of 13 kindergarten buildings, 4 elementary schools 3 senior high schools, one special education facility, and 2 major additions.

One specific project receiving national attention is the planning of an elementary school to be constructed under an elevated interstate highway. This project may help to revolutionize "inner city" and "expressway" planning concepts.

The non-availability of funds and resources for new construction in recent years, has led to an overall construction deficit in excess of 300 million dollars. Various means of reducing this deficit in the future are being studied. Specific efforts were development of data and priorities for a bond issue, initial research in "systems" or modular construction, and the initial stages of a survey of the provision of architectual services.

The addition of new facilities and aging of existing buildings without adequate increases in maintenance resources has presented problems in maintaining adequate maintenance services. Many minor maintenance projects have been considerably delayed or not begun in order to insure the provision for necessary and emergency services. In an attempt to increase response and officiency through the reduction of travel time, the Redland or south maintenance sub-station has been placed in operation. Increased efficiency of supervision has been accomplished through the regrouping of the various trades and services. A professional survey of the Maintenance program has been completed by Crosap, McCormick and Paget, and a report is expected shortly.

The addition of facilities has also had an impact on the administration of Operations and Custodial Services. Shortages of labor, aging custodial equipment, and lack of an adequate training program have limited the efficiency of the custodial effort. To remedy these problems changes were made in the hiring and provision of part-time custodians, allowing students to work in this area, which has allowed significant relief of the custodial labor shortage. Feasibility studies have been made in the decentralization of the custodial supervision and training functions.

The rapidly rising costs of garbage and trash removal prompted an analysis of this area. Initial indications warranted detailed research, which has been initiated.

Changes in liability laws required the revision of the rental program to insurance coverage. Efficiency of this program will be increased by the implementation of plans to transfer rental collection responsibilities to the Finance Program which is better equipped to provide this service.

Increasing frequency and magnitude of school disturbances has necessitated a rapid growth in the resources of the Security Program. An increase of personnel in January, 1970, of almost 100% was required in order to insure the continued provision of security services, i.e., protection of employees, students and facilities. Recent disturbances and widespread unrest have made it necessary to curtail routine activities in investigation and patrol to maintain order in schools. Security personnel are now permanently assigned in 7 schools. This has resulted in the necessity to again increase the resources of the Security program to insure the provision of security services.

Patrol, investigation, and installation of alarms have had some effect in reducing overall losses due to theft and property damage. 1969 losses were approximately $300,000 less than 1968, primarily due to reductions in arson and accidents.

SUMMARY OF PLANS FOR FISCAL YEAR 1970-71

Program Description

The Physical Plant Program provides the necessary facilities, grounds, and related services required to house the various programs and personnel of the Dade County Board of Public Instruction. Included in this program are: plant and site planning; direction of the construction program through the Architect to the Board and the Building Committee; maintenance of facilities and equipment; insuring the efficient, safe and proper operation of all facilities; protection of school property, personnel, and students; and implementation of all Board policies pertaining to these areas.

Highlights of Program Plans

- Increased use of formal studies to improve the overall Physical Plant program.
- Expansion of the Redland maintenance center into a self-sufficient operation.
- Development of methods for supervisor evaluation of maintenance jobs both before and after in terms of quality and costs.
- Determination of improved maintenace job scheduling procedures to facilitate immediate response to bonafide emergency requests.
- Use of studies in the Operations area: alternative methods of garbage disposal, use of WATS for administration, analysis of centrifugal chiller operating costs.
- Establishment of project control on the scheduling, progress, reporting, finance, and management of major capital projects.
- Resumption of school patrol function in addition to riot control and disturbance prevention due to increased staff.
- Data reflecting the achievement of sub-program objectives will be collected during the fiscal year and will be documented with expenditure information in a Program Report at the middle and end of the fiscal year.

Program Budget

Sub-program	Number Employees	Basic Budget
Physical Plant Management	4	94,110
Maintenance Administration	41	355,074
Maintenance Services	346	4,748,107
Operations Administration	9	89,175
Custodial Services	-	226,540
Plant Planning	4	47,854
Security	49	566,873
Plant Operations Support	1	62,646
TOTAL: Physical Plant Program	454	6,190,379

Physical Plant Management

Effective direction, coordination, and evaluation of all Physical Plant programs is accomplished by the Assistant Superintendent, Administrative Assistant, and two secretaries, through the development of administrative and technical policies and concepts for efficient operation within each program; review of activities, budgets, and reports; personnel observation, and detailed analysis of the various indicative data pertaining to the effectiveness of each program; and development of criteria for specific studies of various aspects of the program by internal or consultant analysis.

Specific projects underway in this area are:

Decentralization of the Maintenance program; study of requirements for increased use of automatic data processing within the Maintenance and Plan Planning programs.

Direction and coordination of the construction program requires constant attention to the coordination of all Physical Plant programs and the Architect to the Board, insuring proper inclusion of security, maintenance and operational requirements in all construction projects.

Specific projects planned in this area are:

Coordination of the development of installed equipment selection criteria; coordination of research into the effects of noise levels on instruction; coordination of development of hardware selection criteria; and coordination of research in the area of modular and systematized construction.

Other specific areas included in this sub-program are:

The leasing of land and buildings required for special and temporary programs; provision of limited administrative support to the Operations, Security, and Plant Planning programs; coordination and development of emergency and Civil Defense procedures, plans, and policies; and provision of administrative support for the control of space allocations and parking assignments at the Lindsey Hopkins complex.

In order to insure completion of the specific studies and other planned functions, an additional administrative assistant is required in this program. Additional funds are also required for building rental to house the expanded Security Program.

Physical Plant Management (cont'd)

PROPOSED BUDGET						
Account Code	BASIC BUDGET		PROPOSED INCREASE		EXPANDED BUDGET	
	No. Emp.	Amount	No. Emp.	Amount	No. Emp.	Amount
2014.00	4	59,280	1	10,347	5	69,627
2014.03	-	1,000				1,000
2024.00	-	25,000				25,000
2034.10	-	1,500				1,500
2034.20	-	2,000				2,000
2034.27	-	1,265		550		1,815
2034.28	-	3,500				3,500
2844.01	-	425		300		725
2854.01	-	140				140
TOTALS:	4	94,110	1	11,197	5	105,307

Maintenance

OBJECTIVES	INDICATORS
To minimize costs and response time, insure maximum quality and efficiency in the provision of maintenance services.	Average labor and material cost per Work Order. Number of repeat Work Orders. Number of emergency Work Orders. Cost of contracted maintenance services. Average completion time per Work Order. Number of Work Order delays due to unavailability of materials. Number of Work Order delays due to lack of personnel. Average delay time in processing work requests. Average overall cost per student. Number of Work Orders initiated. Number of Work Orders completed. Total Work Order hours charged to travel. Total overtime hours.

Maintenance (cont'd)

OBJECTIVES	INDICATORS
To provide labor and materials required to keep all buildings, equipment and grounds in good condition and proper working order.	*Indicators apply to all Maintenance services Number of Work Orders assigned. Number of Work Orders completed. Number of Work Orders incomplete. Number of Work Orders cancelled. Number of Work Order projects completed by Contract. Number of preventive maintenance Work Orders assigned. Number of preventive maintenance Work Orders completed. Number of emergency Work Orders assigned. Number of emergency Work Orders completed. Number of Work Order delays due to lack of materials. Total hours overtime. Total cost for overtime. Total Work Order hours travel time.
To minimize deterioration of buildings caused by natural elements and normal usage and maintain the satisfactory interior and exterior appearance.	Cost of Contracted painting services Cost of in-house painting services. Number of paint related Work Orders. Number of paint projects programmed. Number of programmed projects completed. Programmed repainting interval (years). Number of buildings requiring paint but not programmed. Number of complaints on building appearance. Average actual painting interval (years). Number of non-programmed projects completed.
To provide services required to relocate portable buildings.	Number of building relocations requested. Number of building reloactions completed. Average relocation time per building. Number of supporting Work Orders. Average cost of maintenance services per Work Order. Total costs of maintenance services. Total costs of contracted services. Average contract cost per building relocation. Total cost of relocations.

Maintenance (cont'd)

PROPOSED PLANS

Maintenance Administration

Overall direction, supervision, and improvement of maintenance services is provided by the Director of Maintenance, six supervisors, one technical assistant, one office manager and ten clerical personnel located at the central maintenance compound and the Redland maintenance compound.

Included in this area are:

a. Assignment and scheduling of all work to maintenance crews through work order control section which consists of seven job order clerks.

b. Provision of all parts, materials and supplies required for the completion of maintenance projects as accomplished by the stockroom manager and fourteen clerks, one automotive equipment operator, one laborer and one custodian.

c. The provision of vehicles and support mobile equipment for maintenance job completion as accomplished by one garage foreman and eight mechanics and two laborers.

d. Security services provided by three watchmen.

Specific projects and functions planned include:

a. Evaluation of the effectiveness of the recently established Redland maintenance facility in terms of accumulated back-log and work accomplished at both work locations with a view toward expanding into a self-sufficient organization from the currently limited operation.

b. Evaluation and restudy of current alignment of supervisory responsibilities with a view toward identifying problem areas and requirements of various trades within each.

c. Devise methods by which each supervisor may more effectively schedule and control the work load with emphasis on clearing out the oldest work orders first and providing immediate response to bona fide emergency orders.

d. Devise methods and means by which each supervisor may more effectively evaluate jobs both before starting work and after completion in terms of quality and costs.

e. In conjunction with other divisions (Payroll, Data Processing, etc.), develop methods by which available labor hours may be identified by trade.

f. Define and develop methods by which labor and materials in process may be accounted for.

g. Attempt to identify quantity of and reasons for lost time; i.e., obtaining materials; time lost at schools; travel time; truck and equipment under

Maintenance - Proposed Plans (cont'd)

repair or not available, etc.

h. Continuous review of stock levels with a view toward maintaining minimum stock levels on all stocked items without undue increase in the number of purchase requisitions required.

i. Review and elimination of dead and obsolete stock.

j. Addition of new stock items where usage and space limitations permit.

k. To develop means by which output and requirements of each trade may be measured and manpower requirements may be balanced by shifting of vacancies as they occur and justifying need for additional resources.

l. Develop and train foremen to evaluate and inspect jobs for quality and economy.

In order to effectively provide supervision for anticipated work load, one additional Maintenance Supervisor is required at a cost of $11,500.00.

Support of requested maintenance personnel will require $112,000.00.

Deterioration of existing over-age trucks and the importance of reducing time lost due to vehicle and equipment failure necessitates the additional replacement of five trucks at a cost of $25,000.00.

PROPOSED BUDGET

Account Code	BASIC BUDGET		PROPOSED INCREASE		EXPANDED BUDGET	
	No. Emp.	Amount	No. Emp.	Amount	No. Emp.	Amount
2410.10	10	125,910	1	11,500	11	137,410
2410.20	23	147,286			23	147,286
2410.40	8	51,528			8	51,528
2430.00		10,000				10,000
2430.07		3,850		550		4,400
2430.08		1,500				1,500
2844.10		15,000				15,000
TOTALS:	41	355,074	1	12,050	42	367,124

Maintenance Services

Support maintenance services are performed by various trades and crafts consisting of foremen, mechanics, helpers and laborers (total 336) as directed by administrative personnel. This includes job inspections, lay-outs, completion of work, quality inspection and accounting for labor and materials.

In order to maintain required maintenance services and perform prompt services, an additional forty-five personnel are required as follows:

- 4 - Journeyman Carpenter
- 2 - Carpenter I
- 2 - Shade Mechanic II
- 2 - Shade Mechanic I
- 2 - Journeyman Electrician
- 2 - Electrician I
- 1 - Journeyman Mason
- 1 - Mason I
- 12 - Journeyman Air Conditioning Mechanics
- 6 - Air Conditioning Trades Helper
- 4 - Journeyman Painter
- 2 - Audio Visual Mechanic III
- 2 - Journeyman Carpenter (Locksmith)
- 1 - Automotive Equipment Operator I
- 1 - Foreman, Lock Department
- 1 - Foreman, Metal Shop

Anticipated work load and personnel will require additional materials and supplies, cost of which is estimated at $100,000.00.

Also included in this area are services which are wholly or partially provided by contract services; i.e., painting of buildings; air conditioning (emergency); portable moves; roof repairs; termite services; paving; septic tank and waste; at a cost of $944,100.00.

PROPOSED BUDGET

Account Code	BASIC BUDGET		PROPOSED INCREASE		EXPANDED BUDGET	
	No. Emp.	Amount	No. Emp.	Amount	No. Emp.	Amount
2410.20	346	2,986,607	45	385,759	391	3,372,366
2410.23		35,500				35,500
2410.26		15,000		3,000		18,000
2420.10		740,000				740,000
2420.30		125,000				125,000
2420.00		79,100				79,100
2430.00		690,000		100,000		790,000
2854.01		76,900		25,000		101,900
2844.01				112,500		112,500
TOTALS:	346	4,748,107	45	626,259	391	5,374,366

Operations Administration

OBJECTIVES	INDICATORS
To provide efficient overall administration of the Operations program.	Program cost per pupil Administrative cost/Total program cost (%)
To insure efficient utilization of utilities.	Annual cost of electric, telephone, water, fuel, and waste services. Number of requests for increased service. Utilities costs per pupil. Rate of change of utilities costs.
To implement Board policy as it pertains to the use of school facilities for non-school activities.	Number of applications for use Amount of custodial overtime Amount of clerical time Number of Government agency requests Total uncollectable accounts ($)

PROPOSED PLANS

The overall management of this program is provided by the Director and his clerical staff. Included in this area are the building rental function, review of custodial procedures and policies, research of materials and equipment, direction and coordination of the training function, and development of operating procedures.

The utilities utilization effort is controlled by the Utilities Supervisor, and consists of monitoring utilities costs, developing utilities budgets, reviewing operating procedures, inspecting school utilities areas, and directing research in the utilities area.

Specific projects underway in this area are: detailed analysis of alternative methods of garbage disposal; analysis of advantages of WATS service for the Administration and Planning Program Area; and analysis of centrifugal chiller operating costs for the formulation of equipment selection criteria.

Operations Administration (cont'd)

PROPOSED BUDGET - Part I						
Account Code	BASIC BUDGET		PROPOSED INCREASE		EXPANDED BUDGET	
	No. Emp.	Amount	No. Emp.	Amount	No. Emp.	Amount
2034.10		600				600
2310.00	2	27,462			2	27,462
2310.40	3	20,193	1	5,000	4	25,193
2360.00		1,100				1,100
2360.08		672				672
TOTALS:	5	50,027	1	5,000	6	55,027

OBJECTIVES	INDICATORS
1. To provide required supplies and equipment	Per student expenditure Number of equipment-Replacements Number of stock requisitions Number of specifications
2. To provide necessary personnel-maids and custodians	Custodial staffing formula Man days of custodian vacancies Amount of custodial overtime
3. To train custodians and maids	Number of training programs Man hours of training Inspection reports
4. To recommend schedule assignments	Time and motion studies Number of schedules
5. To inspect buildings and grounds	Number of inspections

PROPOSED PLANS

The provision of custodial services is accomplished by the Custodial Supervisor, 3 Inspectors, and various substitute and part time custodians. Functions included in this area are: assignment of substitutes and part time personnel; provision of supplies and equipment; training; inspection of buildings and grounds; development of standard methods and procedures for custodial maintenance; filling of custodial vacancies; and assignment of part time or temporary help as required.

Plans for increasing the effective provision of inspection, training, and supervision, necessitate the decentralization of this effort. One supervisor and one inspector should be allocated to each district.

A concentrated research program will be implemented to determine the most effective tools, supplies, equipment, and methods available in the sanitation field.

PROPOSED BUDGET - Part II

Account Code	BASIC BUDGET		PROPOSED INCREASE		EXPANDED BUDGET	
	No. Emp.	Amount	No. Emp.	Amount	No. Emp.	Amount
2310.10	4	36,948	10	99,000	14	135,948
2360.00		2,200		5,500		7,700
TOTALS:	4	39,148	10	104,500	14	143,648

PROPOSED BUDGET (Summary)

Account Code	BASIC BUDGET		PROPOSED INCREASE		EXPANDED BUDGET	
	No. Emp.	Amount	No. Emp.	Amount	No. Emp.	Amount
2034.10		600				600
2310.10	6	64,410	10	99,000	16	163,410
2310.40	3	20,193	1	5,000	4	25,193
2360.00		3,300		5,000		8,800
2360.08		672				672
TOTALS:	9	89,175	11	109,500	20	198,675

Operations Administration - All Locations (cont'd)

PROPOSED BUDGET						
Account Code	BASIC BUDGET		PROPOSED INCREASE		EXPANDED BUDGET	
	No. Emp.	Amount	No. Emp.	Amount	No. Emp.	Amount
2310.22		98,840				98,840
2310.26		70,000*				70,000
2360.00		51,000				51,000
2844.01		1,700				1,700
2854.01		5,000				5,000
TOTALS:		226,540				226,540

*Includes overtime and substitute custodians at all centers.

Plant Planning

OBJECTIVES	INDICATORS
To provide adequate facilities for all programs.	Total expenditure for new student stations Percentage of capital outlay budget expended on new student stations Cumulative number of months of delay due to site availability
To modernize and renovate existing plants	Total number of renovation requests on file Number of projects completed Cost of modernization and renovation projects Increase in air conditioned space Percentage of capital outlay budget expended on renovation and modernization.

PROPOSED PLANS

The Director of School Plant Planning, Site Planning Supervisor and two secretaries coordinate the pertinent activities of those involved in the following functions:-

School Plant Planning
Educational Equipment Selection and Procurement
Architectural Design
Construction Scheduling and Planning
Construction Contracting
Construction Supervision
Project Control
Site Selection, Procurement and Improvement

Specific major projects under construction are: Three high schools; two elementary schools; thirteen Kindergarten and one Special Education Center. Major projects in some phase of architectural design are: One junior high school, four elementary schools; one Special Center; one major junior high school addition and one major elementary school addition. Smaller projects in some serious prearchitectural planning stage are: Two comprehensive senior high schools; three junior high schools and five major (million dollar plus) additions to secondary schools.

Plant Planning - Proposed Plans (cont'd)

There are, in addition to these, in excess of 250 smaller funded projects which are in some phase of engineering development or construction.

Planned site acquisition for next year approximates 70 parcels for 19 school sites. The current catalogue of required construction and needed sites totals $347,766,920.

Specific projects which will be accomplished to enhance the planning effort and facilitate project and capital requirements control are:

A - Placing capital requirements requests on an EDP basis to enable an accurate and speedy manipulation of data so that listings by various categories and within assigned financial parameters may be prepared on a timely basis.

B - An evaluation system for completed plants will be developed to enable the dissemination of information concerning both the good and bad features from an educational point of view and encourage inclusion of desirable features in new plant plans.

C - Establishing complete project control on the scheduling, progress reporting, finance and management of selected major projects.

PROPOSED BUDGET

Account Code	BASIC BUDGET		PROPOSED INCREASE		EXPANDED BUDGET	
	No. Emp.	Amount	No. Emp.	Amount	No. Emp.	Amount
2014.00	4	$ 45,204				
2014.03		1,000				
2034.27		1,100				
2844.00		550				
TOTALS:	4	47,854				

Security

OBJECTIVES	INDICATORS
To reduce the dollar loss of School Board property through preventive actions, such as patrolling Board property, the apprehension of the guilty, recovery of equipment, and collection of restitution.	Dollar loss due to vandalism and theft Number of apprehensions of guilty parties Dollars of restitution collected Value of equipment recovered.
To protect personnel and students from harm while involved in school activities.	Number of incidents investigated Number of subjects identified and prosecuted
To prevent damage to persons and property by riots and demonstrations.	Number of incidents investigated Cost of damage to facilities or equipment due to riots or demonstrations

PROPOSED PLANS

The Security program plans are formulated around three primary functions:
1) The prevention of losses to the system due to vandalism, theft, and arson;
2) The investigation of violations pertaining to personnel and facilities; and
3) The prevention and control of disturbances, demonstrations, or riots in the schools.

Since the prevention and control of disturbances must take priority over the other functions, all resources have been directed toward this objective, for the past several months.

In order to allocate resources for the accomplishment of patrol and investigation functions, additional personnel and equipment are required.

Plans call for the assignment of sixty-nine Patrolmen, three Supervisors, and an Assistant Director to the patrol function. This would allow night and weekend patrol of all facilities.

An Assistant Director, and twenty-five Investigators, would be assigned to the investigation of violations, and recovery of equipment.

Disturbance prevention and riot control will be provided by diverting personnel from the patrol and investigation functions as required. This area, as well as the overall direction of the Security program, is under the control of the Director.

The Director's clerical staff processes Plant Security Reports, patrol and investigation reports, and assists in the recovery of equipment and restitution.

The reduction of losses and apprehension of violators can be greatly enhanced through the installation of alarm systems. Additional equipment, and two technicians, are required to expedite the movement and installation of alarms in required areas.

Security (cont'd)

PROPOSED BUDGET						
Account Code	BASIC BUDGET		PROPOSED INCREASE		EXPANDED BUDGET	
	No. Emp.	Amount	No. Emp.	Amount	No. Emp.	Amount
2014.00	49	457,923	58	529,463	107	987,386
2014.03		5,000				5,000
2014.06		6,000				6,000
2024.00		20,000				20,000
2034.10		6,000		4,000		10,000
2034.20		3,450		6,550		10,000
2034.27		47,300		62,700		110,000
2034.28		1,200		300		1,500
2844.01		20,000		40,750		60,750
2410.20			2	13,638	2	13,638
TOTALS:	49	566,873	60	657,401	109	1,224,274

Plant Operations Support

PROPOSED BUDGET						
Account Code	BASIC BUDGET		PROPOSED INCREASE		EXPANDED BUDGET	
	No. Emp.	Amount	No. Emp.	Amount	No. Emp.	Amount
2341.00		9,000				9,000
2342.00		9,400				9,400
2343.00		150				150
2344.00		4,096				4,096
2410.20	1	6,400			1	6,400
2620.10	-	33,600		12,000		45,600
TOTALS:	1	62,646		12,000	1	74,646

APPENDIX B

PERSONNEL DIVISION PROGRAM REPORT

PHYSICAL PLANT DIVISION PROGRAM REPORT

PROGRAM REPORT

(July 1, 70 - December 31, 70)

PROGRAM AREA: ADMINISTRATION PLANNING

PROGRAM: PERSONNEL

SUB-PROGRAM: PERSONNEL POLICY DEVELOPMENT AND ADMINISTRATIVE STAFFING

OBJECTIVES	INDICATOR DATA
To develop personnel staffing policies that will insure equal consideration of all qualified applicants and selection of the best qualified applicant.	Number of policies revised, submitted to the School Board and Approved. NONE
To revise the Handbook of Instructional and Clerical Allocations to schools and district offices and prepare a consolidated report of staffing each school year.	A revised regular Handbook 1 A Handbook for alternate plan of staffing 1 A consolidated report of Instructional and Clerical staffing in schools and district offices. 1
To develop personnel policies for the selection of persons to fill administrative positions, i.e., coordinators, supervisors, directors, principals and assistant principals.	Proposed policies for selection of persons to fill administrative positions approved by the School Board. One Revision
To provide the services necessary for the identification and selection of qualified administrators for staff positions.	Number of Positions advertised 104 Number of applications reviewed 1480 Number of interviews conducted 559 Number of positions filled 66

PPBES FORM C-1 - 70

154

PROGRAM REPORT

(July 1, 1970 - December 31, 1970)

PROGRAM AREA: PERSONNEL DEPARTMENT

PROGRAM:

SUB-PROGRAM: INSTRUCTIONAL STAFFING

OBJECTIVES	INDICATOR DATA
To provide the instructional staff (teachers) for the school system	1,249 new teachers employed to open school 8-17-70 35 new teachers employed during September 1970 30 new teachers employed during October 1970 32 new teachers employed during November 1970 55 new teachers employed during December 1970 1,402 new teachers employed as of December 21, 1970 Annual State Accreditation Report (ACC-3) indicates a substantial percentage of staff teaching out of field. (See report in Mr. Parnell's Office) Personnel recruites interviewed approximately 5,000 applicants for instructional positions on campuses in 28 states and Florida. Administrative Research report indicates 424 new teachers were recruited from outside Florida. 5,223 instructional applicants were interviewed in personnel office from January 2, 1970 to December 30, 1970. Data for six (6) months as follows: 505 July 1970 — 178 October 500 August — 262 November 240 September — 419 December

PPBES FORM C-1 - 70

OBJECTIVES	INDICATOR DATA
	1,523 applications for reassignment were filed by instructional personnel as of August 24, 1970. 2,641 positions were filled by reassignment (effective 8-24-70) 452 July 1970 — 445 October 292 August — 76 November 1,310 September — 66 December Note: The pairing of schools and other court-ordered transfers areflected in the September and October transfers.
To provide emergency substitute teachers for the schools.	1,387 persons were processed as emergency substitutes as of September 1, 1970 691 October 328 November 149 December Each month approximately 30-40 principals call for assistance in obtaining substitute teachers.
To provide counseling services for teachers with regard to evaluation, continuing employment, reassignment, dismissal and certification.	Approximately 150 teachers had conferences to go over their evaluations and other material in personnel folders. Over 100 persons had conferences relating to their reassignments, both voluntary and involuntary. An inordinate number of conferences were held in refernce to cerfification. a. over 100 per day via telephone b. over 100 per week in personal conferences. Over 150 conferences were held with individual teachers and principals concerning the unsatisfactory performance of the teachers who were not being recommended for annual reappointment.

PROGRAM SUMMARY

For summary, reference is made to the objectives and their indicators as listed originally,

Objective One has to do with the machinery involved with obtaining the applicant for the instructional positions to be filled annually. This includes the securing of applications, their review and appraisal, the interviewing of the applicants and their ultimate employment and assignment. This function is a twelve-month process per year, with seasoned highs during the months of January through August.

Also included in Objective One are the many conferences and processing with regard to already employed personnel who are seeking reassignment to one of the anticipated vacancies. In addition, there have been a large number of involuntary transfers because of desegregation, changes in pupil enrollment, and pairing of shools.

Objective Two deals with the registering of substitute teachers. The total figures reveal the volume of work involved here. It should be recognized also that the processing of a person on the substitute roles also necessitates a referral to the certification office to determine the obtaining of a Florida teacher's certification. It should be noted that there are seasonal highs in the volume here also.

The Third Objective is the most difficult to enclose in a meaningful statistic because of the nature of the counseling process. In some cases, a teacher who is not being recommended for reappointment will have several conferences whereas teachers with lesser problems will request only one brief conference.

Because of the recent court-ordered desegregation transfers, there is a continuing volume of persons requesting conferences in this regard.

The problems involved in teacher certification are unbelievably manifold. Sometimes they require a number of in-person conferences as well as several telephone calls. Even though this volume may reach seasonal highs during the opening of school and immediately thereafter, the need for counseling in this area remains high throughout the school year.

The members of the staff in instructional staffing devote much of their time in conferences with the principal of schools with regard to the problems already mentioned in previous paragraphs. Many principals prefer to discuss the specific criteria of their teahcing vancancies with a member of instructional staffing. This aspect is not reflected in the indicator data.

PROGRAM REPORT

(July 1, 1970 - December 31, 1970)

PROGRAM AREA:

PROGRAM: Personnel Department

SUB-PROGRAM: Non-Instructional Staffing

OBJECTIVES	INDICATOR DATA
1. To provide the Non-Instructional staff (not including administrators) for the school system.	Total number of vacancies in each job classification each month J A S O N D Clerical 21 44 40 34 42 32 Custodial 22 15 25 16 30 Average number of days required to fill positions in each classification each month J A S O N D Clerical 10 6 5 4 5 8 Custodial Estimate 14 days each month Total number of full time personnel hired each month J A S O N D Clerical 17 44 40 34 42 32 Custodial 55 54 26 26 23 17 Total number of temporary personnel hired each month J A S O N D Estimates 75 10 20 15 10 8
2. To provide for recruitment of applicants for non-instructional positions	Total number of advertisements per month J A S O N D Ads 2 2 3 6 2 2 Total advertising days 122 Total number of persons responding to advertising each month J A S O N D Responses (Estimated) 45 38 14 24 16 33

PPBES FORM C-1 - 70

OBJECTIVES	INDICATOR DATA
2. (continued)	Percentage of total number of applicants who are screened through interview and tests each month All clerical applicants are tested 33 1/3% qualify for Maintenance, S & D and Transportation are interviewed at those locations
3. To maintain adequate salary schedules and publish the Dade County Schools' Salary Handbook	Total number of classification changes adopted as a result of various surveys None Date of published salary handbook 10-12-70
4. To maintain equity of the Unified Classification Plan and provide adequate salaries in support of the Non-Instructional Staffing function	Total number of new positions established 3 Total number of reclassification requests 61 Total number of reclassifications recommended 14 Total number of positions reclassified 14
5. To produce a document which describes the authorized budgeted non-instructional personnel in each administrative department	Report indicating comparison of authorized/actual non-instructional staff in each department

PPBES FORM C-2 - 70

PROGRAM SUMMARY

For this summary, reference must be made to the objectives and their indicators as originally established.

Objective one cannot be fully reached because the complete personnel function is divided between four different work locations. Effective control is exercised over employment and staffing in the custodial and clerical areas. Therefore our statistics in these categories may be considered accurate. Data was not obtained from Maintenance, Stores and Distribution, and Transportation.

Objective two includes the recruitment effort in all categories of non-instructional employment, except for administrative positions. Much of the advertising effort was directed toward filling new jobs; and a minor part of it was necessary because of turnover.

Due to the need at Transportation, at the beginning of this school year, for fifty-five new Bus Drivers, we found it necessary to run the ad for Bus Drivers several times during the six month period.

The non-instructional staffing function cannot be consolidated, adequately staffed, and effectively maintained in the Personnel Department because of limited physical facilities. Therefore, achievements remain less than satisfactory.

In reviewing the objectives associated with the Wage and Salary functions, it is felt that further details are required regarding objective five.

A number of provlems regarding the establishment of a budget document of authorized positions throughout the system have been encountered. Originally it was anticipated that once we established on line capabilities of the terminals all updating and corrections could be handled with ease, however, during the ensuing period new computer equipment was installed which has to date prevented error corrections and establishment of this document. Presently we are still working closely with the Budget Department and CDP in hopes that finalization may be accomplished prior to entailed requests for this years' budget.

PROGRAM REPORT

(July 1, 1970 - December 31, 1970)

PROGRAM AREA:

PROGRAM: PERSONNEL

SUB-PROGRAM: PERSONNEL OPERATIONS AND RECORDS

OBJECTIVES	INDICATOR DATA
To maintain an updated master record for all employees.	Total number of employees finger-printed and photographed each month - Total of 4,900 for period; average of 847 per month. Total number of paychecks which were not issued on the scheduled pay date - Indicator data is not provided in that means for collecting same are not as yet developed to the extent required to provide meaningful information. Actually, the number of paychecks not issued on scheduled pay date is reduced substantially by the issuance of manual checks in those instances wherein sufficient data is in the record to permit issuance of a manual check. It is suggested that this indicator be eliminated. Total number of new records created - 4,076 Total number of personnel record changes processed during the six month period - 114,973

OBJECTIVES	INDICATOR DATA
To provide a personnel record information center.	Total number of active personnel files presently being maintained - 27,000. Total number of inactive personnel files presently being maintained - 62,330. Total number of inactive personnel files created - 830.
To provide essential personnel services regarding retiring employees, credit references, draft deferments, subpoenas, requests for leave and temporary duty.	Total number of applications for retirement processed - 249. Total number of credit references prepared each month - Total of 7,151 for period; average of 1,192 per month. Total number of draft deferment letters prepared - 220. Total number of subpoena responses prepared - 23.

OBJECTIVES	INDICATOR DATA
To provide administrative support for all activities of the personnel department including processing of requisitions, processing of new employees and budget preparation.	Total number of requisitions processed each month - Total of 233 for period; average of 39 per month.

PROGRAM SUMMARY

No significant problems were encountered during the period relating to the successful achievement of the stated objectives; however, it is pointed out that initial conversion to the use of Sanders Cathode Ray terminals for direct on-line updating of the computerized master personnel records was accomplished during the period.

There remain several major functional areas within the Personnel Department for which objectives and indicators have not yet been developed. Planning is continuing in order that these functional areas may be adequately identified and objectives and indicators developed for 1971-72.

PHYSICAL PLANT PROGRAM

July 1, 1970 - December 31, 1970

PROGRAM AREA: Administrative and Support

PROGRAM: Physical Plant

PROGRAM SUMMARY

Significant developments and problems are detailed in sub-program reports. Of primary importance were the changes in the Maintenance sub-programs, and changes in the organization of the Plant Planning sub-program. The addition of Educational Specifications responsibility and review of the indicators in the Plant Planning sub-program has resulted in the number of indicator changes included in that report.

Decentralization of custodial supervision and maintenance services in continuing, with construction of the North Maintenance facility scheduled to begin shortly.

A study is in progress by a management consulting firm, to determine and analyze the alternatives for the provision of architectural and engineering services in the plant planning and construction programs.

Funds have been budgeted and purchase of a portable standby air conditioning unit is under way. This unit is to be used to allow the continued use of smaller (6 packs, kindergarten buildings) air conditioned facilities during extended A/C equipment outages. Study is continuing on the feasibility of this system for larger facilities.

PROGRAM REPORT

(July 1, 1970 - December 31, 1970)

PROGRAM AREA: ADMINISTRATIVE AND SUPPORT

PROGRAM: PHYSICAL PLANT

SUB-PROGRAM: OPERATIONS ADMINISTRATION

OBJECTIVES	INDICATOR DATA
TO PROVIDE EFFICIENT OVERALL ADMINISTRATION OF THE OPERATIONS PROGRAM	Per Pupil - $.34 Administrative cost 1% of total program

PROGRAM REPORT

(July 1, 1970 - December 31, 1970)

PROGRAM AREA: ADMINISTRATIVE AND SUPPORT

PROGRAM: PHYSICAL PLANT

SUB-PROGRAM: OPERATIONS ADMINISTRATION--UTILITY UTILIZATION

OBJECTIVES	INDICATOR DATA
TO INSURE EFFICIENT UTILIZATION OF UTILITIES	Total cost six-month period - $1,838,097 Per Pupil - $7.66 Rate of change - +20% Electric - $1,028,375 Telephone - 319,814 Water, Sewer - 386,000 Fuel - 103,908 Requests for changes in service - 180

PPBES FORM C-1 - 70

PROGRAM REPORT

(July 1, 1970 - December 31, 1970)

PROGRAM AREA: ADMINISTRATIVE AND SUPPORT

PROGRAM: PHYSICAL PLANT

SUB-PROGRAM: OPERATIONS ADMINISTRATION--RENTALS

OBJECTIVES	INDICATOR DATA
TO IMPLEMENT BOARD POLICY AS IT PERTAINS TO THE USE OF SCHOOL FACILITIES FOR NON SCHOOL ACTIVITIES	Number of Applications - 370 Amount of Custodial Overtime - $9840 Amount of Clerical Time - $3500 Number of Government Agency Requests - 48

PPBES FORM C-1 - 70

PROGRAM SUMMARY
One additional clerk-typist was assigned to the office staff. Lamp specifications updated.

PROGRAM REPORT

(July 1, 1970 - December 31, 1970)

PROGRAM AREA: ADMINISTRATIVE AND SUPPORT

PROGRAM: PHYSICAL PLANT

SUB-PROGRAM: CUSTODIAL SERVICES

OBJECTIVES	INDICATOR DATA
TO PROVIDE REQUIRED SUPPLIES AND EQUIPMENT	Per student expenditure - $1.50 Number of equipment-Replacements - 39 Number of stock requisitions - 2,568 Number of new specifications - 48
TO PROVIDE NECESSARY PERSONNEL-MAIDS AND CUSTODIANS	Custodial staffing formula - +18 Man days of custodian vacancies - 104 Amount of custodial overtime - $31,429
TO TRAIN CUSTODIANS AND MAIDS	Number of training programs - 6 Man hours of training - 480 Inspection reports - 758
TO RECOMMEND SCHEDULE ASSIGNMENTS	Time and motion studies - 2 Number of schedules - 1,378
TO INSPECT BUILDINGS AND GROUNDS	Number of inspections - 758

PPBES FORM C-1 - 70

PROGRAM SUMMARY
Six District Supervisory positions were established. Staffing allocation formula revised to reflect impact of 10-hour day program. Study relative to changing cost of custodial supplies. Planning for development of training programs.

PROGRAM REPORT

(July 1, 1970 - December 31, 1970)

PROGRAM AREA: Administrative and Support

PROGRAM: Physical Plant

SUB-PROGRAM: Plant Planning

OBJECTIVES	INDICATOR DATA
To provide adequate facilities for all programs	Amount of funds, number of projects, and percentage of budget obligated prior to July 1, 1970 a. $25,942,828 b. 314 c. 54.9% Amount of funds, number of projects, and percentage of budget obligated July 1, 1970 - Dec. 31, 1970 a. $ 6,095,772 b. 119 c. 12.9% Amount of funds, number of projects in planning, and percentage of budget unobligated July 1, - Dec. 31, 1970 a. $10,963,834 b. 70 c. 23.2% Amount of funds and percentage in fund balance a. $ 4,225,640 b. 9.0% Analysis of July 1, - Dec. 31, 1970 obligated funds a. New student station 1. $ 4,945,000 2. 10.5% of construction budget 3. 81.7% of July 1, - Dec. 31, 1970 budget 4. 5 projects or 4.3% of total number of projects

PPBES FORM C-1 - 70

OBJECTIVES	INDICATOR DATA
	b. Non-student stations 1. $ 1,150,772 2. 2.4% of construction budget 3. 18.3% of July 1, - Dec. 31, 1970 budget 4. 114 projects or 95.7% of total number of projects Analysis of July 1 - Dec. 31, 1970 unobligated funds a. New student stations 1. $ 8,088,755 2. 17.1% of construction budget 3. 73.8% of July 1 - Dec. 31, 1970 budget 4. 12 projects or 17.4% of total number of projects b. Non-student stations 1. $ 2,875,079 2. 6.1% of construction budget 3. 26.2% of July 1 - Dec. 31, 1970 budget 4. 58 projects or 82.6% of total number of projects Value of projects in work Dec. 31, 1970 $47,228,024 Renovations requests received (Forms 111) 50 Renovations completed 52

PROGRAM SUMMARY

The Director of School Plant Planning, Site Planning Supervisor, Supervisor of Educational Specifications, and three secretaries coordinate the pertinent activities of those involved in the following functions:

School Plant Planning
Educational Equipment Selection and Procurement
Architectural Design
Construction Scheduling and Planning
Construction Contracting
Construction Supervision
Project Control
Site Selection, Procurement and Improvement
Development of Educational Specifications

During September, 1970 the Educational Specifications Department, formerly in the Educational Division, was transferred to the Physical Plant Division. The new department will be responsible to the Director of School Plant Planning and be directed by a Supervisor of Educational Specifications. In addition to the Supervisor another secretary was added to the division.

The nature of the work of the Educational Specifications Department is so closely related to the Physical Plant Division that such a move will add to the efficiency of plant planning functions.

Thirteen (13) kindergartens, one (1) special education building, one (1) elementary school, and one (1) addition were accepted since July 1, 1970. During the same period several other smaller projects were completed and others funded.

Additional architectural planning was continued on two (2) elementary schools, one (1) junior high school, one (1) senior high school and one (1) special education center.

175

PROGRAM REPORT

(July 1, 1970 - December 31, 1970)

PROGRAM AREA: Administrative and Support

PROGRAM: Physical Plant

SUB-PROGRAM: Security

OBJECTIVES	INDICATOR DATA
To reduce the dollar loss of School Board property, through preventive action such as patrolling Board property, the apprehension of the guilty, recovery of stolen equipment, and collection of restitution	Dollar loss due to vandalism and theft $ 173,907 Number of apprehensions of guilty parties 248 Dollars of restitution collected $ 3,968 Value of equipment recovered $ 6,694
To protect personnel and students from harm while involved in school activities	Number of incidents investigated 441 Number of subjects identified 630 Number of subjects prosecuted 414
To prevent damage to persons and property by riots and demonstrations	Number of incidents investigated 1 Cost of damage to facilities or equipment due to riots or demonstrations $ 613

PPBES FORM C-1 - 70

176

PROGRAM REPORT

(July 1, 1970 - December 31, 1970)

PROGRAM AREA: Administrative and Support

PROGRAM: Physical Plant

SUB-PROGRAM: Maintenance Services

OBJECTIVES	INDICATOR DATA	
To provide labor and materials required to keep all buildings, equipment and grounds in good condition and proper working order.	Number of Work Orders assigned	33,142
	Number of Work Orders completed	28,209
	Number of Work Orders incomplete	4,933
	Number of Work Orders cancelled	
	Number of Work Order projects completed by contract	57
	Number of preventive maintenance Work Orders assigned	1,880
	Number of preventive maintenance Work Orders completed	1,405
	Number of emergency Work Orders assigned	3,428
	Number of emergency Work Orders completed	3,311
	Number of Work Order delays due to lack of materials	
	Total hours overtime	1,528
	Total cost for overtime	$7,530
	Total Work Order travel time	

PPBES FORM C-1 - 70

PROGRAM REPORT

(July 1, 1970 - December 31, 1970)

PROGRAM AREA: Administrative and Support

PROGRAM: Physical Plant

SUB-PROGRAM: Maintenance Services

OBJECTIVES	INDICATOR DATA	
To minimize deterioration of buildings caused by natural elements and normal usage and maintain the satisfactory interior and exterior appearance.	Cost of Contracted painting services	$118,728.00
	Cost of in-house painting services	$117,030.38
	Number of paint related Work Orders	90
	Number of paint projects programmed	49
	Number of programmed projects completed	15
	Programmed repainting interval (years)	6
	Number of buildings requiring paint but not programmed	
	Interior and Exterior	28
	Interior	1
	Exterior	5
	Number of complaints on building appearance	
	Average actual painting interval (years)	9 - 10
	Number of nonprogrammed projects completed	3

PPBES FORM C-1 - 70

PROGRAM REPORT

(July 1, 1970 - December 31, 1970)

PROGRAM AREA: Administrative and Support

PROGRAM: Physical Plant

SUB-PROGRAM: Maintenance Services

OBJECTIVES	INDICATOR DATA	
To provide services required to relocate portable buildings.	No. of Building relocations requested	74
	No. of Building relocations completed	73
	Average relocation time per building	3 Days
	No. of Supporting Work Orders	21
	Average cost of maintenance services per Work Order	$819.12
	Total costs of maintenance services	$17,201.60
	Total costs of contracted services	$72,812.00
	Average contract cost per building relocation	$983.95
	Total cost of relocations	$90,013.60

PPBES FORM C-1 - 70

PROGRAM SUMMARY

Significant changes, and/or accomplishments are noted in detail in the attached project reports. Establishment of the CIF may result in some changes in objectives and indicators of this sub-program, in the future.

Indicator data reveals that the Maintenance services workload remained relatively stable with the work backlog slightly decreased. However some areas continued to accumulate greater backlogs, particularly carpentry and locksmiths. The additional air conditioning personnel and support equipment added late in the reporting period, did not significantly affect that backlog.

Some indicator data could not be recovered, or was not available. Development of a complete information system is one of the projects of the Maintenance System Project Group.

PPBES FORM C-3 - 70

APPENDIX C

EXCEPTIONAL CHILD OBJECTIVES/INDICATORS BY SUBPROGRAM (AREA OF EXCEPTIONALITY)

Exceptional Child
Objectives/Indicators

by

Sub-program (Area of Exceptionality)
(Draft Copy)

August, 1970

182/183

EDUCABLE MENTALLY RETARDED

Elementary School:	Indicators
To develop a capacity for communication.	Achievement test scores: (reading, spelling) Number and percent at 2nd grade level Number and percent at 3rd grade level Number and percent at higher grade levels Number and percent of children demonstrating ability to read for information and safety (measured by scores on Barnell Loft "Following Directions" exercises, informal teacher-made tests, or by ability to recognize signs: stop signs, etc. included in the Milton Bradley "See and Read" collection)
To teach basic computational skills and the use of money.	Achievement test scores: Number and percent at 2nd grade level Number and percent at 3rd grade level Number and percent at higher grade levels Number and percent demonstrating ability to use money (as measured by teacher observation and/or role-playing) Number and percent demonstrating ability to use number combinations in everyday life (measured by teacher observation of child's ability to play games involving number combinations, his ability to match the number of children in the class with the number of desks-or whatever-needed, etc.)
To develop social competency and emotional security.	Number and percent of children demonstrating ability to interact positively with other children and adults (measured by teacher observation) Number and percent demonstrating positive attitudes towards themselves (measured by standardized personality tests such as the TAT-Thematic Apperception Test) Number and percent demonstrating positive attitudes towards other people (measured by standardized tests - see above)

EDUCABLE MENTALLY RETARDED (cont'd)

Elementary School:	Indicators
To develop independence and resourcefulness.	Number and percent of children demonstrating ability to initiate activities (as measured by teacher observation). Number and percent of children demonstrating ability to plan and complete activities (as measured by teacher observation; records of numbers of tasks planned and completed out of total numbers assigned). Numbers and percent demonstrating ability to care for their own needs at a given age level (as measured by standardized tests such as the Vineland Social Maturity Scale).
To develop basic concepts of family and community life.	Number and percent of children demonstrating (perhaps through role-playing) knowledge of the names and roles/responsibilities of members of the family and the community. Measured (through informal testing) knowledge of these names and roles. Number and percent of children who participate in family and/or community activities (help wash dishes, cut grass, etc. at home; attend church or temple, public concerts; use public playgrounds, etc.; in community).
To provide guidelines for choosing wholesome recreational and leisure time activities.	Number and percent participating in school and community recreational activities and sports events. Number and percent participating in activities relating to music and art. Number and percent participating in youth activities such as Scouts, Brownies, etc. Number and percent of children whose names <u>do not</u> appear on rolls of juvenile authorities or police.

EDUCABLE MENTALLY RETARDED (cont'd)

Elementary School:	Indicators
To develop gross and fine motor skills.	Number and percent of children scoring at the 10th grade level on the Purdue Perceptual/Motor Inventory; number and percent scoring above that level; number and percent scoring below that level. Number and percent of children demonstrating ability to compete in individual and team sports (as measured by number and percent of times child or team wins and/or number and percent of times child is chosen as a team member). Number and percent participating successfull in school physical education program (measured by grades Physical Education teacher assigns).
To develop habits basic to health and safety.	Number and percent of children meeting specified physical standards (measured by check list and/or teacher observation). Number and percent of children demonstrating awareness of safety rules (as measured by informal testing and teacher observation of adherence to these rules). Number and percent of children who remain healthy and safe (measured by percent and number of days they attend school, number of times they need hospitalization or another type of special health service, etc.).

EDUCABLE MENTALLY RETARDED (cont'd)

Middle/Junior High School:	Indicators
To develop arithmatic skills that are pre-conditions for employment.	Percent of students who can tell time. Percent of students that can identify currency: both coins and bills. Percent of students who can make correct change for one, five, ten, and twenty dollar bills.
To develop acceptable personal hygiene habits.	Check list of standard health habits.. e.g. bathe every day, brush your teeth twice a day, cover your mouth when you cough or sneeze, wash your hands before eating, etc. (Teacher made check list to be marked by both the teacher and the parent).
To develop reading skills necessary for safety at home, at work and at play.	Percent of students who can identify and read safety signs, e.g.; stop, detour, do not enter, watch your step, danger, poison, flammable, fire exit, etc.
To provide information to youth and parents through counseling.	Number and percent of students receiving help in conference type counseling sessions. Number and percent of parents receiving help in conference type counseling sessions.
To develop a knowledge of community services.	Teacher made check list. If you are sick and cannot go to a private physican where can you go for help? (Public Health Clinic) If you are looking for a job where can you go to get help in finding work? (State Employment)
To develop skills in reading for information.	Percent of students who can follow written instructions.. e.g.; car license, marriage license, join a club, start a savings account, etc. Percent of students who can fill out social security forms, employment placement forms and unemployment compensation forms. Achievement scores in reading and comprehension on the Dade County Special Reading Inventory. (That percent who read and comprehend at a 3rd grade level).

EDUCABLE MENTALLY RETARDED (cont'd)

Middle/Junior High School:	Indicators
To develop social skills such as good manners at home, at work and at school.	Social adjustment inventory marked by teaher. (Teacher made) Social adjustment inventory marked by parent. (Teacher made)
To provide opportunities for group participation.	Number of students in youth organizations..e.g. scouts, school patrols, church clubs, etc.
To develop and encourage athletic ability.	Number of measured achievements as outlined by the Kennedy Physical Fitness Program.
To develop and encourage interest in spectator sports.	Teacher made rating scale to determine degree of interest.
Senior High School:	
To prepare an educable mentally retardate to be self-supporting.	Percent that have jobs when they leave schocl. The number and percent who drop out during the academic year.

EMOTIONALLY DISTURBED

Elementary School:	Indicators
To modify negative attitudes and behavior patterns until acceptable patterns of behavior are achieved, or until termination of the sub-program in grade six.	Results of teacher constructed sociogram. Subjective data: evaluations based upon sub-program teacher's observation. Standardized tests of social development such as the Vineland Social Maturity Scale.
To develop a more adequate self-concept and establish good interpersonal relationships with peers, adults, authority and family situations. To minimize emotional anxieties by the end of the elementary school experience.	Rate of return from sub-program to full time regular classroom attendance. Reports from parents, regular teachers, and school psychological specialists concerning improved behavior. Reduced incidence levels of aggression and hostile acts directed toward peers.
To improve, strengthen, and reinforce the basic skills of reading and arithmetic which act to enhance self-confidence. To encourage creative and spontaneous thinking.	Improved scores on standardized achievement tests. Reports by regular classroom teacher of greater academic success, interest in learning, and social participation. Willingness to assume leadership in innovative or unusual classroom activities.
To develop positive leadership ability and a willingness to enter into social participation appropriate <u>with</u> grade placement.	Number of times the student is selected or nominated for a leadership role by his peers. Willingness to share room responsibilities. Able to make the transition from primary to intermediate level social and recreational development tasks.

EMOTIONALLY DISTURBED (cont'd)

Middle/Junior High School:	Indicators
To enable the student to perform with acceptable behavior to the extent that he can cope with the pressures of regular school placement (related to class sizes, curriculum and demands of social conformity).	Percentage of emotionally disturbed students making successful adjustments in their return to regular school settings per academic year. Differences in the incidence of disruptive behavior when returned pupils are compared with peers who remained in regular classroom placement.
To establish techniques for good interpersonal relationships with family members, peers (group and individual), and adults (teachers, persons in authority, etc.).	Regular follow up interviews with parents should indicate reports of improved intrafamilial relationships. Sociometric evaluation by peers should show significant improvement in peer acceptance as measured by choice frequency. (Bower, 1960. "Class Play Technique"). Reduced number of incidents relating to deviant behavior in inter-personal relationships (at school as measured by teacher rating) (C. E. Bower, Eli, 1960, Pupil Behavior Rating Scale).
To develop in the child a positive self-concept which results in self-rewarding achievement (eliminating extensive/intensive needs for external rewards).	Pupil who is ready to return to regular class should show greater ascendency as measured by the Gordon Personal Profile measure of self-concept. Pupils should show greater performance autonomy as measured by direct teacher observation of his ability to persist unaided on assigned tasks.
To prepare the individual for coping with everyday life situations such as employment, leisure time activities, decision making, and crisis events.	Percentage of children who can successfully participate in work study program or employment skill training. Pupil should show an increased ability in analytical thinking as measured by objective tests such as the Heston Personal Adjustment Inventory. Returned pupils should show significantly smaller number of drop outs when compared with pupils identified as disturbed who did not participate in the program.

EMOTIONALLY DISTURBED (cont'd)

Middle/Junior High School:	Indicators
To evoke from the student, performances (academic, vocational, and creative) in keeping with his inherent potential.	Reduction of discrepancy between intellectual potential as measured by standard I.Q. test (WISC) and academic achievement as measured by the Iowa test of Basic Skills. Increased vocational interest profile differentiation as measured by the Thurstone Interest Schedule. (differentiation presumes increased maturity of vocational interest). Increased creative potential as measured by the Baron Welch test.

GIFTED

Elementary School:	Indicators
To identify gifted pupils	Number and percentage of pupils scoring above 130 on an Intelligence Test. Number and percentage of pupils scoring above the established norms on Torrance Tests of Creativity. Number and percentage of pupils scoring above the 90 percentile on achievement test. Number and percentage of pupils meeting more than 90% of the selection criteria.
To develop talent or talents of gifted pupils such as academic, creative, reasoning, performing, communication, forecasting, and decision-making.	Number and percent of pupils at defined levels who achieve 90% or more by formal and/or informal assessments. Number and percent of pupils reaching this objective. Number and percent of pupils at defined levels who achieve specific skills as determined by formal assessments. Number and percent of pupils needing more development.
To develop interests in areas other than the ones for which a pupil is considered talented.	Number and percent of pupils who will exhibit a defined increased in assessed interests other than the ones for which the pupils are considered talented after one year in the program. Number and percent of pupils who achieved above the average norms of creative thinking after one year in the program.
To develop abilities to pursue interests independently.	Number and percent of satisfactory participants after one year in the program. Number and percent of pupils performing independently in a satisfactory manner as determined by anecodotal records. Number and percent of pupils who are rated by teachers as satifactory independent learners. Number and percent of pupils who fulfill contractual agreements satisfactorily. Number and percent of pupils equipped for independent living after one year in the program.

GIFTED (cont'd)

Elementary School:	Indicators
To develop group interests toward recognition of societal responsibilities.	Number and percent of pupils making contributions to group organizations. Number and percent of pupils performing satisfactorily in group situations as determined by anecodotal records. Number and percent of pupils actively participating in out-of-school or community activities and organizations. Number and percent of pupils who are rated by their teachers as making satisfactory responses to group efforts.

HEARING IMPAIRED

Elementary School:	Indicators
To effectively provide services for hearing impaired students.	Number of students enrolled in the hearing impaired program--pre-school and elementary. Percentage of hearing impaired students serviced in the program as compared to the number of hearing impaired students in Dade County.
To develop oral communication skills.	Number of hearing impaired students developing intelligible speech as measured by the teacher on these various level scales: (C.I.D.) PB word lists 1, 2, 3, 4; R List 1; mutiple-choice word list of Ohio State University; Larsen Sound-Discrimination list. Number of hearing impaired students able to develop expressive language skills as stated on elementary (primary and intermediate) levels in the Buell curriculum guide; Quill curriculum guide; Fitzgerald Key; Pugh Language Development Manual. Number of hearing impaired students developing good lipreading skills as measured by BTL sentences; Buell list of lipreading words and sentences at different elementary levels; Quill manual-lipreading goals.
To develop effective written communication skills.	Number of students able to express ideas in proper grammatical form as measured by the number and percent of students able to score at grade level according to the Quill and Buell scales.
To develop the capacity for intellectual advancement through reading skills.	Reading comprehension at elementary level as measured by Metropolitan and Stanford Achievement tests. Vocabulary development at the elementary level as measured by the Stanford Achievement tests: appropriate scale in Quill Curriculum Guide.

HEARING IMPAIRED

Elementary School:	Indicators
To develop good social skills.	Percentage of children able to successfully interact with a group (normal/heaing impaired children) as measured by teacher observation in both groups. Scores obtained on various social maturity scales, i.e.; Vineland Social Maturity Scale, as measured by the percent and number of students able to obtain a score above 9 years. Results of sociometric tests measuring leaders, isolates, rejectees.
To prepare hearing impaired children for future successful community living.	Percentage of children able to work independently with minimal aid from exceptional child teacher or resource teacher. Number and percent of children able to follow oral and written directions successfully for their grade and chronological level.
To counsel regularly with the parents of the hearing impaired children.	Number of meetings with each parent. Percentage of total number of parents participating in the meetings. Parental satisfaction as reported on a prepared form.
To effectively fuse children into hearing classes.	Percentage of hearing impaired children who are performing satisfactorily in the regular classroom--by teacher report. Achievement test scores: Reading, spelling, language, and mathematics. Number and percent at grade level.

HEARING IMPAIRED (cont'd)

Middle/Junior High School:

	Indicators
To effectively provide services for hearing impaired students.	Number of students enrolled in the hearing impaired program--Middle/Junior High School. Percentage of hearing impaired students serviced in the program as compared to the number of hearing impaired students in Dade County.
To develop oral communication skills.	Number of hearing impaired students developing intelligible speech as measured by the teacher on these various level scales: (C.I.D.) PB word list of Ohio State University; Larsen Sound Discrimination list; Slosson Test for Oral Language. Number of hearing impaired developing good lipreading skills as measured by BTL Sentences; C.I.D. everyday speech lists A-I; Buell list of Lipreading Words and sentences at Middle/Junior High School level; Quill Manual--lipreading goals. Number of hearing impaired students able to develop expressive language skills as stated on the Middle/Junior High level in Buell Curriculum Guide; Quill Curriculum Guide; Fitzgerald Key; Pugh Manual for Language Development.
To develop effective written communication skills.	Number of students able to express ideas in proper grammatical form as measured by the number and percent of students able to score at grade level according to the Quill and Buell Scales. Number and percent who score above grade level on the grammar subtest of the Stanford Achievement Test.
To develop the capacity for intellectual advancement through reading skills.	Reading comprehension at the Middle/Junior High school level as measured by the Stanford Achievement Test and the Bottel Reading Inventory.

HEARING IMPAIRED (cont'd)

Middle/Junior High School:	Indicators
To develop good social skills.	Percentage of children able to successfully interact with a group (normal hearing/ hearing impaired) children or students as measured by teacher observation. Scores obtained on various social maturity scales such as the Vineland Maturity Scales and the Verbal Language Development Scale (as extension of the Vineland Social Maturity Scale). Results of sociometric test measuring leadership, popularity and socialization.
To prepare hearing impaired students for future independent community living.	Percentage of children able to work independently with minimal aid from exceptional child teacher or resource teacher. Number and percent of children able to follow oral and written directions successfully. Number and percent of students able to participate in a pre-vocational program. Number and percent of students able to participate in an academic program in preparation for higher education.
To counsel regularly with the parents of hearing impaired students.	Number of meetings with each parent(s). Percentage of total number of parents participating in the meetings. Parental satisfaction as reported on a prepared form which indicates realistic goals.
To effectively fuse children into hearing classes.	Percentage of hearing impaired students who are performing satisfactorily in the regular classroom--by teacher reports and observations. Achievement test scores: Social sciences, English, mathematics, science, language. Number and percent at grade level.

HOMEBOUND-HOSPITAL

Elementary School
Middle/Junior High School
Senior High School

	Indicators
To maintain and develop study habits in all academic areas for homebound-hopitalized pupils.	Inventory of study skills prior to pupil's return to regular classroom.
To maintain and promote social and emotional growth for all homebound-hospitalized pupils.	Teacher and parent opinion as to degree of social and emotional growth as indicated on check list of evaluation sent to parents and teachers when pupil returns to regular classroom. Check list forwarded for evaluation within six weeks after return to school.
To provide for the educational needs of the temporarily homebound-hospitalized pupil so that he can return to his regular classroom without loss of academic achievement.	Number of temporarily homebound-hospitalized pupils served during school year. Check list that will indicate the percentage of pupils returning to regular classroom. Measured satisfaction of parents and teachers of pupils returning to regular classroom.
To help the permanently and temporarily homebound-hospitalized pupil to adjust to his handicap, if any, and accept his limitations.	Professional opinion (teachers and doctors) through a check list obtained at end of elementary level, middle/junior level, and senior high level.
To provide for the continuing educational needs of the permanently homebound-hospitalized pupil resulting in the awarding of a high school diploma and/or a certificate of termination.	Number of permanently homebound-hospitalized pupils served each school year. Number of permanently homebound-hospitalized pupils receiving a high school diploma and/or certificate of termination each school year. Measured satisfaction of parents of students terminating because of age.

LEARNING DISABILITIES (cont'd)

Elementary School:	Indicators
	The number and percent of children achieving near capacity level at the end of an academic year as measured by standardized tests which measure: (See tests for indicators on the previous page)
	The number of students returned to regular classrooms.
	The number of children identified as having learning disabilities who receive remediation through the classroom teacher with the assistance of the learning disabilities teacher.
To provide and educational setting and program for that child whose disabilities are so severe that he can never function in a regular classroom.	Number of children that teachers feel cannot cope with the regular classroom setting due to hyper-activity and/or brain injury.

PHYSICALLY HANDICAPPED

Elementary School:	Indicators
To develop a means of written communication.	Uses pen, pencil, typewriter satisfactorily in accordance with physical limitations as judged by teacher observation. Percentage of children making a satisfactory (C) grade in written work.
To provide necessary occupational and physical therapy.	Number of hours of therapy. Number of children in therapy. Therapy progress reports based on tests devised by occupational and physical therapists.
To serve all physically handicapped (motor, neurologically impaired and special health problems) requiring such services in Dade County.	Number of children. Number of teaching units.
To provide services for the non-academic children (multiple handicapped, severe physical involvement or combination of both).	Measured satisfaction of parents. Number of children served.
To prepare students for fusion into regular school program.	Acceptable grades (C or better) in a regular situation - (full or part time). Number of children fused.
To develop the recognition and acceptance of abilities and disabilities.	Adult observation. Student adjustment.
To develop the ability to care for personal needs i.e. bathroom, feeding, personal cleanliness.	Occupational therapy testing activities of daily living as devised by therapists. Teacher observation and teacher check lists of skills in self-help care.
To develop the ability to communicate with others.	Speech intelligibility as measured by teacher observation. Speech therapist testing of articulation skills.

PHYSICALLY HANDICAPPED (cont'd)

Middle/Junior High School:	Indicators
To serve all physically handicapped children in Dade County schools who have motor, neurological or special health problems.	Number of children. Number of teaching units.
To provide services for non-academic physically handicapped children.	Measured satisfaction of parents. Number of non-academic physically handicapped children who are not able to participate in grade level activities.
To develop the ability to communicate with others.	Speech therapy screening test administered by school speech therapist. Teacher observation of students success in communicating with others in writing, speech or sign and successful completion of academic tasks using methods best suited to his disability.
To develop the recognition and acceptance of personal abilities and disabilities (self-concept).	Adult observation. Student adjustment.
To provide necessary O.T. and P.T. for the physically handicapped needing it.	Number of hours of therapy recommended by student's doctor. Number of student receiving therapy on doctor's recommendation.
To prepare the student for fusion into the regular school program.	Number receiving acceptable stanines or percentiles on standardized tests administered to total student population. Successful accomplishment in grade level subjects as indicated by average or above marks in academic subjects before fusion.

SOCIALLY MALADJUSTED

Middle/Junior High School:	Indicators
To modify attitudes and behavior to help the adjudged delinquent student become more acceptable to society as a whole.	Number and percent of students who show a marked improvement in their weekly evaluation by teachers, counselors, and social workers. Peer reaction via sociograms, teacher observation, counselor and social worker evaluation.
To motivate students to improve and develop their language arts skills since part of their social maladjustment is their inability to communicate with society as a whole.	Achievement test scores. Reduction in number and percent of those pupils not attending at grade level.
To promote regular school attendance.	Decrease in the number and percent of absences and tardies per school month.
To establish a more socially acceptable self-concept which would also be pleasing to the delinquent student adjudicated by the court.	Number and percent of students who show a marked improvement in their weekly evaluation by teachers, counselors, and social workers. Percent of students who show growth in the area of self-concept as measured by a self-concept inventory such as Gordon's "How I See Myself".
To develop saleable skills for job placements when students leave the formal education situation.	Number of students placed into vocational subjects at special schools who continue and achieve satisfactorily.
To develop a respect for the state, federal, and local laws that have been broken and caused them to be adjudged delinquent by the court.	Degree of transfer of adjustment as shown by his conformity to school regulations as measured by the number and percent of decrease in infractions as shown in the weekly evaluation by the social workers and counselors.

SPEECH THERAPY

Elementary School
Middle/Junior High School
Senior High School

	Indicators
To improve teachers understanding of the speech and language patterns of minority groups, including Black Americans through meetings outling appropriate referral criteria.	Number of hours spent in faculty meetings. Number of students referred. Number of appropriate versus inappropriate referrals.
To conserve hearing through audiometric testing, appropriate referrals and follow-up.	Number of children given an audiometric evaluation. Number of children found to have a hearing loss by an audiologist (outside of the school system). Number of children whose hearing problem is medically versing educationally remediable.
To diagnose and provide appropriate therapy to improve oral communication skills.	Total number of children tested. Total number of children found to have a speec problem. Total number of children needing therapy who could not be served because of lack of personnel. Number of hours spent in therapy. Number of children whose communication skills have improved as measured by the results of the Templin-Darley and Goldman-Fristoe Articulation Tests, and teacher; parent satisfaction.
To consult with classroom teachers and guidance personnel as a means of remediating speech and/or language problems.	Number of hours spent in consultation. Number of children served by this method. Number of children who need therapy but must have consultative services because of lack of personnel. Number of students whose speech improved as measured by the Templin-Darley and the Goldman-Fristoe Articulation Inventories and/or Utley Lipreading Test. Measured satisfaction of parents and school personnel.
To provide staff development through workshops and inservice training sessions (faculty meetings).	Number of inservice sessions. Improved audiometric and articulation testing as evidenced by accuracy of audiological and medical referrals and selection.

TRAINABLE MENTALLY RETARDED

Elementary School:	Indicators
To effectively provide classes for trainable mentally retarded children at the elementary level.	Percentage of number served compared to the number in community. Measured satisfaction of parents with classes.
To develop and improve skills in personal hygiene and to promote maximum independence in self care taking into account intellectual disability.	Number and percent of children with standard specified health habits, e.g., tooth brushing, bathing. Number and percent of children able to feed themselves in an acceptable manner, e.g., eat in public restaurant or cafeteria. Number and percent able to dress themselves independently and appropriately, e.g., zippering, buttoning, raincoats, sweaters.
To develop socialization with peer group, family, and community.	Number and percent of children remaining in community rather than in institutions. Number and percent of children who achieve a social age of 6^+ years as determined by the Vineland Social Maturity Scale with the teacher as the evaluator.
To develop and improve communtication skills.	Number and percent of children able to follow oral instructions of teacher or parents. Number and percent of children able to communicate adequately with intelligible speech. Number and percent of children who achieve a 6^+ year developmental level on appropriate speech tests, e.g., Templin-Darley, Goldman-Fristoe.
To develop and improve gross and fine motor skills considering the intellectual disability and/or physical disability.	Number and percent of children participating in physical education. Number and percent of children able to print their names and color within limits.
To develop adequate work habits and skills.	Measured opinion of teachers concerning children demonstrating self-discipline, e.g., acceptable behavior in classroom, hallways, auditorium, buses. Measured opinion by teacher and parents concerning children accepting responsibility for certain tasks, e.g., care of school property, making beds, cleaning room.

TRAINABLE MENTALLY RETARDED (cont'd)

Elementary School:	Indicators
To develop an interest in leisure time activities.	Number and percent of children using community leisure time activities.
Middle/Junior High School:	
To develop and improve skills in self-care.	Number and percent with socially acceptable self habits. Number and percent able to select appropriate clothing for any occasion and weather.
To develop social adjustment.	Number and percent remaining in the community through adulthood. Number and percent who are able to function in a sheltered work shop or day care center. Number and percent whose social age measures at seven plus years using the Vineland Social Maturity Scale with the teacher as the evaluator.
To develop and improve skills in communication.	Number and percent able to follow instructions from teachers, parents, peers, and employers. Number and percent able to communicate adequately with peers and adults. Number and percent able to score at the seven plus chronological age on the Templin and Darley Test or the Fristoe Test.
To develop gross and fine motor skills.	Number and percent participating in physical education. Number and percent who are able to write their names, address, telephone number, and birthdate. Number and percent able to know number concepts up to 100 and to be able to make change for $1.00. Number and percent who know colors and use them correctly.

TRAINABLE MENTALLY RETARDED (cont'd)

Middle/Junior High School	Indicators
To develop work habits and skills.	Number and percent showing self-discipline, e.g. distributing writing paper, books, and other supplies in the classroom. Number and percent able to follow directions given by teachers, peers, and family, e.g. returning articles and supplies to their proper places, assisting in clearing tables in the cafeteria. Number and percent able to recognize safety sign in public places and observe safety rules at school, at home and in the community.
To develop pre-vocational work habits and skills on the secondary level.	Number and percent who are eligible for a sheltered workshop. Number and precent who develop some home making skills, e.g. simple sewing, simple ironing and cooking.
To develop skills in wise use of leisure time.	Number and percent able to function in the facilities provided by the community service organizations. Number and percent who develop a hobby.

VISUALLY HANDICAPPED

Elementary School:	Indicators
To develop fundamental tools for academic learning.	The number and percent of children scoring above the sixth grade level on the indicated achievement test given for the year, county-wide, adapted in large print or braille for visually handicapped children.
	Percentage of visually handicapped children in the Dade County program successfully fused into a regular classroom for academic learning.
To develop the skills needed by visually handicapped children for communication in a sighted world.	The number and percent of children mastering the Braille code according to check lists of Braille symbols as introduced in reading series or guide books published by the American Printing House for the Blind.
	The number and percent of children mastering the use of the typewriter according to a teacher test based on typewriting method of the teacher's choice.
To develop the visually handicapped child's creative ability through the fine arts.	The number and percent of children who show the ability to express themselves in use of art media.
	The number and percent of children who actively participate in the music program.
	The number and percent of children who show ability to use the arts for leisure.
To teach visually handicapped children orientation and mobility skills to enable them to travel independently in their homes and schools.	The number and percent of children who are able to organize their personal belongings according to the teacher's checklist and ancedotal records.
	The number and percent of children who are able to travel around their homes independently.
	The number and percent of visually handicapped children who are able to travel independently in their school using mobility according to a checklist of mobility techniques taught.
To develop social skills of visually handicapped children.	The number and percent of visually handicapped children who are accepted close to or slightly below the norm for the class, in which he is fused, according to a sociogram.
To develop good health habits in visually handicapped children.	The number of absences in school attendance records for the year.
	Number of families following up with health check-ups and periodic vision checks.

VISUALLY HANDICAPPED (cont'd)

Elementary School:	Indicators
To develop wholesome self-concepts for emotional stability in the visually handicapped child.	The number and percent of children able to accept their physical limitations as observed by the teacher of the visually handicapped child.
To develop activities of daily living.	The number and percent of children who are able to provide self help in body care (dressing, bathing, feeding, etc.) according to a checklist of the teacher.
Middle/Junior High School Senior High School	
To develop a level of academic capability in blind students enabling them to complete an adjusted secondary curriculum comparable to that of the sighted child.	Percentage of youngsters fused into classes for their academic subjects. (Middle/Junior and Senior). Percentage of youngsters enrolled in college. (Senior) Number going on to Senior High School. (Middle/Junior) Percentage graduating from high school. (Senior) Results of standardized tests, College Boards Entrance Exams (Senior) Achievement Tests (Middle/Junior). Percentage of youngsters entering Post High School training programs. (Senior)
To successfully develop and refine the special skills necessary to communicate with a "sighted world".	Number of children successfully completing a typing course. (Middle/Junior) Percentage of children showing a proficiency in the use of braille writers, talking book, tape recordings, stylus, and typewriters. Number fused into academic classes. Subjective opinion of regular classroom teacher as to child's ability to receive work (Braille) etc.; and transmit work (typewritier).

VISUALLY HANDICAPPED (cont'd)

Middle/Junior High School Senior High School	Indicators
To develop pre-vocational attitudes and vocational skills for economic self-sufficieny. and Senior)	Number not dependent upon welfare after completion of school years. (Middle/Junior and Senior) Number placed in training programs and on job. (Middle/Junior and Senior) Subjective questionnaire sent to employers.
To provide a knowledge of good health habits resulting in the attainment of strength and coordination.	Teacher observation and evaluation by checklist of body cleanliness and good grooming. Number and percent in adjusted Physical Educatio Program. Student absenteeism rate. Number achieving physical fitness standards. Absence of blindisms viz. rocking, gauging of eyes etc.
To provide the orientation and mobility skills necessary for economic independence and social adjustment.	Number and percent working away from home. (Senior) Number and percent who can "trail" around school grounds. (Middle/Junior) Number and percent who successfully utilize cane travel. (Senior) Number and percent who travel independently. (Middle/Junior and Senior) Number and percent involved in social groups outside of the home. (Middle/Junior and Senior) Opinion of teachers as to social adjustment and desire to be mobile in regular class. Number and percent being served by a mobility instruction at least once a week. Number successfully completing adjusted home economics course. (Senior) Parential questionnaire. Number well groomed due to own efforts. Number who can care for their own body in regards to skill associated with physical development, viz., dressing, eating. (Middle/Junior) Number and percent in art and music classes. Number and percent not involved in secondary activities.

APPENDIX D

EXPLORING THE APPLICATION OF PROGRAM PLANNING, BUDGETING, EVALUATING METHODOLOGY AT THE SCHOOL LEVEL: A REPORT ON A TEACHER SEMINAR

EXPLORING THE APPLICATION OF PROGRAM PLANNING, BUDGETING, EVALUATING METHODOLOGY AT THE SCHOOL LEVEL: A REPORT ON A TEACHER SEMINAR

Program Planning, Budgeting, Evaluating System Project
Dade County Public Schools
Miami, Florida

212
211

TABLE OF CONTENTS

	Page
List of Teacher Participants	i
Introduction	ii
A Proposal for a School Level PPBES	1
Guidelines for Developing a School Program Memorandum (Plan/Budget)	2
Guidelines for Identifying Program Objectives/Indicators	6
Examples of Program Objectives/Indicators Developed at the Seminar	9
Teacher Reactions to the Proposal	16

Appendices

Appendix A:	Alternative Proposals for a School Level PPBES Proposed by Participants	21
Appendix B:	Daily Agendas for Seminar.	22
Appendix C:	Participant Evaluation of Training Aspects of Seminar	27

LIST OF TEACHER PARTICIPANTS

Pauline Benson
James Fales
Eliott Fledell
Ilene Guinyard
Dagmar H. Hall
Katharine Hoolihan
Peter Huffman
Robert Jones
Marcia Klinkenstein
Katheryn S. King
Marjorie S. Knight
Jane MacDonald
Frank Maristany
Harvey Melton
Betty Newell
Brona Newman
Richard McGuire
Robert White
Frank Wilson

INTRODUCTION

During the week of June 22-26, 1970, the PPBES staff in conjunction with the Division of Instruction sponsored a seminar to explore the possibilities of using PPB methodology to improve planning and budgeting at a school level. Since many authors concerned with the use of PPB methodology in school districts maintain that some use of the methodology or an adjunct of it is necessary at a school level, the staff wished to explore the forms which such an application might entail. Rather than attempt to pilot an unrefined model in an operational school situation, it was felt that an intensive simulation of the processes in a controlled situation would provide sufficient initial feedback both from the direct reactions of the participants as well as the observations of the project staff. Twenty teachers who were then assigned to a variety of teaching situations and schools were employed for the seminar.

To facilitate the exploration, (cf. Appendix B: Daily Agendas for Seminar) the teachers after an orientation were asked to develop measurable objectives for programs which they were currently teaching or of which they had indepth experience. They were then constituted as the hypothetical faculty of an elementary and a junior high school and simulated the development of a program plan and budget for the schools using guidelines defined by the project staff. After several days of intensive simulation of the processes entailed in the guidelines as well as interim discussions, the participants prepared a comprehensive reaction to the guidelines including their insights concerning the mix of such activities with current school planning and budgeting practices (summarized within this report).

A PROPOSAL FOR A SCHOOL LEVEL PPBES

The project staff presented to the participants a proposal which included the development of a school plan or program memorandum as part of the budgeting cycle. The program memorandum would consist of the following elements:

Objectives/indicators for the next academic year by sub-program (in this instance a particular discipline-based program such as mathematics or a particular interdisciplinary level of elementary school such as kindergarten)

Proposed plans to accomplish the objectives with a proposal for any needed additional allocations

Sub-program budgets.

In a proposed calendar presented to the participants, it was envisioned that the program memorandum would be developed by the principal and faculty at the end of the academic year. The school program memorandum would be reviewed by the district superintendent in sufficient time to allow for the ordering of materials/equipment. The actual guidelines which the participants used are included next within this report.

The proposal also called for the development of a program report which would accompany the program memorandum and essentially report on accomplishments of the planned school programs of the completed academic year. The elements of this program report would consist of the following:

Identification of indicator data by sub-program

Narration of major programming accomplishments as well as problems

Attachment: summary of actual expenditures by sub-program from the Finance Division.

Participants obviously could not simulate the development of a program report; however, the elements of such a document were presented to them to round out the proposal.

GUIDELINES FOR THE DEVELOPMENT OF A SCHOOL PROGRAM MEMORANDUM

OBJECTIVES/INDICATORS (PPBES FORM A2-70)

A. REVIEW OF OBJECTIVES FOR EACH SUB-PROGRAM: The objectives for each sub-program which will be planned for the next academic year should be carefully reviewed as part of the process of program planning. This review should be carefully undertaken by the principal and faculty considering at least four criteria: Do the objectives as defined adequately reflect those system priority goals which are appropriate for the school (objectives which are so considered should be labeled: (PRIORITY GOALS); are the objectives as stated appropriate for the student population of the school; do these objectives describe the major benefits from a sub-program which accrue to the learner; are the objectives as defined useful in a PPBES? (see following page)

B. REVIEW OF INDICATORS: Indicators for each objective should be listed adjacent to the described objective. Lines should be typed between each objective and its set of indicators for readability. A final review of indicators should be undertaken during the planning process considering at least two criteria: do the indicators provide a valid basis for measuring the performance of the program (see following page); is the data described by the indicators available or obtainable without cumbersome procedures?

C. NUMBER OF COPIES OF FORM: As many copies of this form as are necessary may be used. In any event the name of the sub-program should be identified on each copy and the form given a page number when all the documents of the PROGRAM MEMORANDUM are completed.

UTILITY OF OBJECTIVES/INDICATORS IN A PPBE SYSTEM

	Program Planning	Budgeting	Evaluating
Objectives	Provide direction for the planning of activities	Aid in determining priorities for the allocation of resources	Relate performance to planned activities
Indicators	Facilitate the comparison of alternatives		Provide units for performance measurement

3217

PROPOSED PLANS (PPBES FORM A3-70)

A. OPTIONAL USE OF INDIVIDUAL SUB-PROGRAM PLANS: The principal in cooperation with the faculty may choose to develop an overall program plan for the entire school which communicates all the individual sub-program plans as a whole or individual plans for each sub-program may be developed. If the option of a total school plan is chosen, this form should be labeled with the name of the school only. If the option of developing individual sub-program plans is chosen, this form should be labeled with the name of the sub-program as well as the name of the school.

B. BASIC PURPOSE: The basic purpose of this form is to describe and detail for another level of decisionmaking the planned combination of resources (personnel and materiel) which should result in the achievement of sub-program objectives.

C. TYPE OF PLAN: Most proposed plans will involve a verbal description of the special activities which have been planned to accomplish the objectives. Plans should not focus upon typical course patterns which are well known, such as the number of classes of English 7, English 8, or General Math. Plans should describe special arrangements which have been planned to facilitate the achievement of sub-program objectives, such as: documented articulation of units among different courses of a sub-program; the establishment of resource centers, programmed instruction labs, remedial labs, tutorial sessions; the use of special teaching materials or equipment; the request for staff development of the faculty in a particular area; the use of support services from the district or system level.

D. AMOUNT OF DETAIL: Proposed plans should be sufficiently detailed to communicate how the proposed combination of resources will result in the achievement of objectives. Plans should contain as much specific information (number and types of resource units, the number of students who will be served per week in a remedial lab, the name of special equipment and/or teaching materials) as is necessary.

E. NEEDS FOR ADDITIONAL PERSONNEL/MATERIEL ALLOCATIONS: Proposed plans should contain a separate section labeled: NEEDS FOR ADDITIONAL ALLOCATIONS (if the situation so warrants). This section should describe in detail additional resources which are needed over and above the regular school allocations, the use to which such resources will be put, and the effect of the allocations upon the objectives of one or many of the sub-program objectives.

F. NUMBER OF COPIES OF FORM: As many separate copies of this form as are necessary may be used. In any event the name of the school (or the name of the sub-program - school) should be identified on each copy and the copy given a page number when all the documents of the PROGRAM MEMORANDUM are completed.

PROPOSED BUDGET (PPBES FORM A5-70)

A. EACH SUB-PROGRAM MUST HAVE A SEPARATE BUDGET FORM: A separate budget form should be developed for each sub-program, including the number of teachers and/or para-professionals; the amount of equipment, the amount of teaching materials.

B. LOCATION NUMBER: The BAS location number for the school should be identified on each budget form.

C. ADMINISTRATION/SUPERVISION: A separate budget form should be developed for the Administration/Supervision sub-program at the school. This sub-program will include: the principal and assistant principals (number); clerks and secretaries who serve the entire school rather than individual sub-programs; supplies and materials which are administrative in nature or which may not be feasibly allocated to a single sub-program, e.g., mimeograph paper. (This budget form has been developed for the hypothetical school as well as the budget for Library/AV Services, Guidance/Counseling Services).

D. FRACTIONAL PERSONNEL UNITS: In the event of splits between sub-programs of teaching or para-professional personnel, e.g., the case of a teacher who teaches three classes of Language Arts and two of Social Studies, count each class as 1/5 of a teacher and enter the summation of all fractions on the budget form. The basis for splitting para-professionals' time should be individually determined.

E. NEEDS FOR ADDITIONAL FUNDS: Any needs for additional funds should be identified in the PROPOSED INCREASE section of this form for the appropriate sub-program(s).

F. NUNBER OF COPIES OF FORM: As many separate copies of this form as are necessary may be used. In any event the name of the sub-program - school and the school location number should be identified on each copy and each copy given a page number when all the documents of the PROGRAM MEMORANDUM are completed.

GUIDELINES FOR DEFINING OBJECTIVES/INDICATORS
(GENERAL INSTRUCTION SUB-PROGRAMS)

1. Objectives/Indicators Define Sub-program Benefits: The identification of the objectives of a sub-program and the means by which their achievement may be determined (indicators) in reality define the sub-program benefits for which plans are formulated. Therefore, objectives/indicators should define changes and growth in the concepts, skills, and attitudes of learners and not the means by which growth and development should be accomplished. "To provide each learner with individualized instruction" is not a desirable objective in a PPBES but the means by which certain desirable educational benefits might be accomplished.

2. Objectives/Indicators Involve a Choice Among Alternatives: All of the benefits of any sub-program cannot possibly be identified in a PPBES. In particular, those objectives which are somewhat intrinsic to Education in general, e.g., the socialization of youth, should be excluded. However, such objectives should be included if they form the rationale for much of the planning of a sub-program, if they are of crucial interest for a particular student population or if they are of crucial interest at a moment in time. For example, if the development of an attitude of mutual student trust and acceptance is of crucial interest in program planning in many sub-programs, it could be included as an objective. However, an indicator or set of indicators should also be defined for such an objective. Choices among potential objectives should be made in the main on the basis of two criteria: a. a defined objective with its indicators identifies the unique benefits of the sub-program and b. the accomplishment of the objective entails the planning of such factors as: the sequence of courses of the sub-program; textbook, instructional materiel, equipment expenditures; cooperative faculty arrangements such as resource classrooms, programmed instruction labs, tutorial sessions, the use of additional personnel, materiel allocations from the district or system level.

3. Defining Objectives/Indicators Should Be Process-Oriented: The very act of defining and clarifying the benefits from sub-programs is of prime importance in a PPBE System. The definition of sub-program objectives should therefore conceptually preceed any consideration of the "how" of their measurement. Objectives should not be chosen for their ease in measurement, but for their value as an expression of the benefits which learners should receive from a particular sub-program. Once a group of tentative sub-program objectives has been determined, a set of indicators, considered as a set, should provide a valid and measurable means for ascertaining the relative achievement or non-achievement of the sub-program objectives. The repeated mental interaction of identifying a set of measurable indicators for a group of tentative objectives, if engaged in as a process, should result in a greater clarification and specification of the objectives themselves.

4. Types of Indicators: All indicators in a PPBES must be measurable but such measurement may be accomplished in a variety of ways, ranging from a systematic statement of opinion to an enumeration of the number of students who can perform a certain task. Indicators should be stated as specifically as possible (as opposed to objectives) and should identify the concepts, skills, or attitudes which are being measured and the means of measurement. Typical means of measurement include: questionnaire or rating scales measuring opinion or attitudes, teacher-made tests and behavioral inventories measuring knowledge of concepts or capacity to perform certain tasks, standardized achievement tests (names should be identified) measuring the ranking of students compared to a norm group as well as a wide variety of actual counts, e.g., the number of students reading at least one book a month, the number of students attending school concerts, the number of students receiving immediate employment (non-college bound) within three months after graduation.

5. Objectives/Indicators Should Incorporate an End-Result Viewpoint: To facilitate planning as well as measurement, all indicators should incorporate an end-result viewpoint which may be defined as an arbitrary (but logical) point at which the objectives of the sub-program should have been achieved. The logical end for most sub-programs, because of current organizational patterns, is, of course, the objectives which should have been achieved (as measured by the indicators) at the end of elementary school, at the end of middle/junior high school, or the end of senior high school. Three major considerations must underly the incorporation of the end result viewpoint: a. certain objectives/indicators may be identified which are not achieved at the end of a particular level of schooling but which are measured during each year, e.g., the percentage of students who score below the second stanine on a certain achievement test; b. certain sub-programs achieve their objectives not at the end of a level of schooling but when students no longer receive their services, e.g., driver training, kindergarten, primary; c. certain sub-programs because of their elective nature, e.g., foreign language, music, art, will probably incorporate the end result viewpoint by identifying an arbitrary end for a sequence of courses, e.g., the end result after two years of a particular foreign language.

6. PPBES Objectives/Indicators and Behavioral Objectives: Objectives/indicators in a PPBES may or may not resemble behavioral objectives. Sub-program objectives will in the main be much more general than behavioral objectives since they express the benefits of several years of instruction (as opposed to behavioral objectives which express the results of short-term instructional sequences). Indicators will employ a variety of measurements which considered as a set provide a valid means of measurement (as opposed to behavioral objectives which generally employ a single criterion). Objectives/indicators may be related to behavioral objectives if they define a major terminal class of behaviors which were developed over a sequence of several years.

EXAMPLES OF POSSIBLE SUB-PROGRAM OBJECTIVES/INDICATORS

	Objective	Indicators
Generalized Educational Outcomes of Crucial Interest	To develop within the students of Blue Jay Elementary a positive attitude toward and liking for school (Primary and Intermediate sub-programs)	Number and percent of students who are absent during each month Number of suspensions per month Number of students participating in after-school activities per month Percent of students who express highly positive (defined) feelings about the school on an attitude scale
Educational Outcomes Characteristic of a Sub-program	To increasingly develop basic verbal communication skills (Language Arts - Middle/Junior High)	Number and percent of students who cannot read and comprehend typical newspaper articles (teacher-made test) Number and percent of students who cannot satisfactorily fill out typical employment forms (teacher observation) Number and percent of students who score above the eight grade level on Stanford Achievement Test Number and percent of students who can satisfactorily prepare and deliver a three minute speech on a subject of their own choosing (teacher observation)
	To insure that students possess those computational skills necessary for productive citizenship (Mathematics - Senior High)	Number and percent of 11th graders scoring satisfactorily on the arithmetic section of the California Achievement Test. Number and percent of 12th graders completing the Senior Basic Mathematics course.

EXAMPLES OF PROGRAM OBJECTIVES/INDICATORS DEVELOPED AT THE SEMINAR*

KINDERGARTEN

Objectives	Indicators
To enable the child to relate to his surroundings or environment.	Number and percent of children who are able to identify body parts and their relation to physical functions
	Number and percent of children who are able to identify signs, professional people, and business areas from sets of pictures
To provide for the development of each child's gross and fine motor skills.	Number and percent of children who score above the 85%ile on the Dade County Primate Gross Motor Evaluation
	Number and percent of children who are able to perform at their age level or above on the Winterhaven or a like test
To develop each child's understanding and use of mathematical skills in a concrete and abstract form.	Number and percent of children who score above the 80%ile on the Dade County Math Readiness Test

PRIMARY

To insure that the child (unless involved in a specialized disabilities program) is able to achieve success in mastering reading skills and to enjoy reading independently at his own level.	Number and percent of children utilizing library facilities (whether classroom, school, or city)
	Number and percent of children who are able to communicate knowledge and express themselves adequately to both teachers and peers as determined by teacher observation
	Number and percent of children attaining above the sixth stanine on the Stanford Achievement Test

*Does not represent an all inclusive list of the objectives/indicators developed at the seminar.

PRIMARY (Continued)

Objectives	Indicators
To develop a usable knowledge of math processes progressing from concrete to abstract concepts.	Number and percent of children who exhibit the ability to solve story problems dealing with everyday situations (handling money, measurement, time, place value, etc.) Number and percent of children who can satisfactorily use such skills in their life situations (school schedules, supply store, lunch money, etc.) Number and percent of children who can pass specified time tests for addition, subtraction, multiplication, and division facts Number and percent of children who attain above the sixth stanine on the Stanford Achievement Test

INTERMEDIATE

To be able to read sufficiently to locate information and to enjoy reading for pleasure.	Number and percent of pupils who regularly read newspapers and magazines as determined by a teacher inventory Number and percent of pupils who participate in current events discussions as determined by teacher observation Number and percent of pupils who are below the fourth stanine on the Stanford Achievement Test Number of times per month that teachers use library materials to supplement reading instruction Number of library books per pupil per month checked out as indicated by circulation records Number and percent of pupils who have public library cards Number and percent of pupils who are able to use reference tools effectively as determined by a standardized library test Number and percent of pupils who own one or more books as determined by teacher inventory

BUSINESS EDUCATION

Objectives	Indicators
Typing: Junior/Senior High	
To adequately develop skill in typewriting for non-vocational use.	Number and percent of students who can attain a speed of 30 wpm at the end of one year of typewriting instruction Number and percent of students who report that they can satisfactorily use typewriting for their own personal use (correspondence, school assignments, extracurricular activities such as journalism)
Non-vocational Business Courses: Senior	
To develop the concepts and skills necessary for economic competency and money management relating to the students' personal lives.	Number and percent of students who can adequately identify the following concepts: a. Savings account (interest, passbook) b. Checking account (check stub, reconciliation statement) c. Insurance (policy, life, casualty) d. Stock market (stocks, bonds, dividends, broker) e. Installment and credit buying (carrying charge, down payment, mortgage, loans, discounts, notes) Number and percent of students who can adequately perform the following functions: a. Write a complete and correct business letter b. Complete several common forms used in business c. Perform computations dealing with percentages and interest d. Balance a check book and prepare a reconciliation statement
Secretarial Sequence: Senior	
To provide for an adequate mastery of the skills, knowledge, and attitudes necessary for a secretarial career.	Number and percent of students who can take transcription at 100 wpm and accurately transcribe their notes on the typewriter after completing two years of shorthand instruction Number and percent of students who can attain a speed of 50 wpm after completing two years of typewriting instruction

BUSINESS EDUCATION (Continued)

Objectives	Indicators
	Number and percent of students who can demonstrate a working knowledge of dictating, calculating, and duplicating machines after completing a course in Secretarial Office Practice or Office Machines
	Number and percent of students who are actually employed as secretaries (with shorthand) within one year after graduation
	Number and percent of students who drop out of the secretarial sequence per year during high school

FOREIGN LANGUAGE

To develop within the students a positive attitude toward mastery of a foreign language enabling them to reach an effective level of fluency after a four year sequence.	Number and percent of students who are able to imitate conversational models at natural speed after the first year
	Number and percent of students who can discriminate sounds and pronounce them in an acceptable fashion after the first year
	Number and percent of students who have mastered the ability to speak with acceptable intonation after the first and second year
	Number and percent of students who can satisfactorily perform necessary changes in form and order in structure drills and exercises after the second year
	Number and percent of students who can manipulate previously mastered conversations by transformational and substitution processes after the second year
	Number and percent of students who can answer questions about daily activities and ask questions relating to such activities after the third year
	Number and percent of students who can use culturally acceptable forms after the third year
	Number and percent of students who can satisfactorily converse with people of the target culture after the fourth year

HOME ECONOMICS

Objectives	Indicators
Required Course: Home Economics 1	
To enable the learner to plan nutritionally adequate meals.	Number and percent of students who can plan adequate daily meals based on the Basic Four
To develop knowledge and skills about fabrics, sewing equipment, and garment construction.	Number and percent of students who can satisfactorily select and use a commercial pattern suitable for their figure, type, size, etc. based on a self evaluation Number and percent of students who can satisfactorily opperate a sewing machine and other project equipment Number and percent of students who produce a simple garment which they feel is satisfactory

LANGUAGE ARTS

Middle/Junior High School	
To continue the development and improvement of basic skills (reading, writing, speaking, and listening).	Number and percent of students who attain above grade level on a standardized reading test Number and percent of students who can acceptably write a paragraph incorporating defined grammar and syntax skills as judged by teacher evaluation Number and percent of students capable of conducting or participating in a class discussion utilizing listening and rhetorial guides as judged by teacher check sheet
Senior High School	
To develop an extended interest in and appreciation for the language arts	Number of students taking each language arts elective in an academic year Number and percent of students participating in extracurricular language arts activities, e.g., dramatics, debate, etc. Number of students per month reading non-required books as determined by the circulation records of the school library

LANGUAGE ARTS (Continued)

Objectives	Indicators
	Number and percent of students indicating they plan to elect a language arts-oriented field in college

MATHEMATICS

Middle/Junior High

To develop proficiency in necessary computational skills.	Number and percent of students who score above the 50%ile on the Computational section of the Florida Ninth Grade Testing Program
	Number and percent of students who satisfactorily exhibit defined computational skills in other subject areas as determined by teacher survey
	Number and percent of student enrolling in an Algebra I course or higher in the senior high school

Senior High

To develop an understanding for and appreciation of mathematical structures and concepts.	Number of students per year who elect non-required mathematics courses
	Number and percent of students who score above the 50%ile on the Concepts section of the Stanford Achievement Test
	Number of students participating each year in mathematics programs outside of the regular school, e.g., university and junior college programs

MUSIC

Objectives	Indicators
Senior High	
To provide opportunities for the development of professional musicians and for making vocational and/or avocational choices.	Number of students who respond to announcements for auditions for roles in musicals, pop concerts, etc. Number of students who plan to elect a music field in college Number of students who receive music scholarships per year

PHYSICAL EDUCATION

Middle/Junior and Senior High	
To provide students with a program of developmental activities that will help them acquire and maintain a high level of physical fitness.	Number and percent of students who equal or exceed national norms on the AAHPER Physical Fitness Test Number and percent of students who fail to attain at least the 15%ile on the AAHPER Physical Fitness Test Number and percent of students who receive awards, e.g. the Presidential Fitness Award, for outstanding physical fitness

SOCIAL STUDIES

To develop student awareness of the necessity of keeping abreast of current events.	Number of students who exhibit an adequate and consistent understanding of current events suitable for different grade levels or classroom quizzes Number and percent of students who influence their parents to subscribe to at least one current events periodical, e.g., Time, Newsweek

SUMMARY OF TEACHER REACTIONS TO THE PROPOSAL
ORGANIZED BY A SERIES OF QUESTIONS

I. Which needs in the area of instructional planning at the school level do you feel that PPB methodology would better meet?

For one, teachers felt that PPBES as an integrated planning-budgeting system would provide a yearly stimulus for their examination of the fundamental goals and needs of each school as well as a better definition of the contributions which each sub-program provides to school goals and needs. The evaluative aspects of PPBES were felt to be a most beneficial contribution, even considering the crude state of the art of educational program evaluation. Several teachers observed that current budgetary practices at schools leave much to be desired since school expenditures (with the exception of budgeted personnel) often take place during the school year resulting in materials/equipment not being available during that year or occur in a hurried attempt to meet budgetary deadlines. These teachers felt that a deliberate effort to develop a plan and budget for each school program prior to the academic year should facilitate all necessary equipment/materials being available during the planned academic year as well as insure a better consideration of the objectives of the expenditures. Certain side effects of PPBES appealed to several teachers. They felt that the adoption of a program planning-budgeting system at schools would tend by its very nature to involve teachers much more in budgetary decisions resulting in a greater sense of responsibility for program accomplishment.

II. Which needs in the area of instructional planning at the school level do you feel that PPB methodology is inappropriate.

Several teachers remarked that any planning methodology cannot provide an immediate answer to some of the most pressing problems of education at this time, i.e., the relevancy of education to youth, the development of community pride. Several teachers also expressed concern that the methodology available for the evaluation of educational programs is still not sufficiently developed for an operational planning system, thus severely limiting the usefulness of PPBES.

III. Appraisal of the Actual Proposal for School Level PPBES

A. Do you feel that groups of teachers, e.g., primary teachers or mathematics teachers, could adequately define (after training) the types of objectives/indicators which are detailed in the proposal? Do you feel that this activity would be a beneficial one in terms of instructional improvement? Could you compare the benefits of defining PPBES objectives/indicators to the process of identifying behavioral objectives?

Teachers in general responded that the identification of program objectives, particularly objectives transcending several courses and several years of instruction, would invariably result in instructional improvement. They also felt that the close connection of such objectives with the planning and budgeting process was most beneficial. Most teachers felt that the kinds of measurable objectives specified in the PPBES proposal would be more beneficial for instructional improvement than behavioral objectives per se both because of their broader orientation as well as the flexibility of measurement.

B. How would faculties regard the need to develop measurable objectives/indicators in the context of system priority goals? Would they regard this as an unjustibiable incursion of downtown?

In the main teachers answered that the development of objectives for individual school programs in the context of system goals would be acceptable to most faculties, if the system goals were broad enough to accommodate individual school differences. Several teachers remarked that overly constrictive system program goals would hamper school planning mainly becuase most teachers feel that some downtown administrators are isolated from the real school problems. They maintained that a joint teacher-administrator determination of system goals would facilitate their acceptance as guidelines for school planning.

C. Do you feel that the development of school or departmental plans and their documentation in a program memorandum would be beneficial? Do you feel that their documentation duplicates current practices?

The need to develop documented plans at the school level was felt by most teachers to be beneficial. Several teachers pointed out that an inordinate amount of detail could result from such a practice. One teacher observed that such a practice would not duplicate present processes since he had not seen any active cooperative faculty-administrative planning activities.

D. In the proposal we have assumed that there would be some kind of district or system supplementary fund for which the needs and program plans of individual schools would "compete" for additional resources. Do you think such a practice could result in improved planning processes? Can you identify reservations about such a practice?

Teachers approached this question in either a negative fashion or with strong feelings that adequate safeguards must accompany such a practice. They felt that a definite potential existed for exaggerated school plans with the more verbally facile school administrators/faculties carrying away the bulk of the supplementary resources. Some teachers felt that the sheer personalities of school administrators could cause inequitable allocations to be made on that basis alone. The consensus of teachers indicated that, while they felt such a practice could conceivably improve planning, the potential for penalizing children was more prominent.

E. What should the role of the principal be in the development of sub-program objectives as well as the documentation of proposed plans?

The question of who is accountable for the results of the plan seemed to underlie teacher's responses to this question. In general, all teachers felt that while the final decision must rest with the principal, his role should be a passive one at least during the actual development of the proposed departmental plans. However, many teachers observed that the determination of the overall school plan, including the integration of sub-program plans, must lie with the principal and his administrative staff.

F. What are the advantages and disadvantages in your mind of developing a budget for each sub-program at a particular school? Again, what should the relative role of the principal and faculty be in the determination of budgets for programs at schools?

Most teachers felt that a budget for each school program would be very advantageous as a stimulant for improved planning both as a vehicle for documenting the resources necessary for each school program's operations as well as a device communicating to a faculty the costs of each department's program. Again, teachers in the main felt that each department should have the option to decide the types of resources necessary for their program once the principal has determined the amounts available to each department (sub-program).

G. In general, how do you feel about the collection of indicator data reflecting the achievement of sub-program objectives? To whom should this data be available? Do you feel that the use and availability of such data would invariably evolve to it use in teacher evaluation?

Teachers generally responded positively to the use and availability of indicator data. They felt that such data should be available to all with a need to know, whether the local school community, district superintendent, or the Superintendent. However, many responded that the main consumers of such data would probably be the school faculty itself. Several prefaced their remarks by observing that adequate safeguards would need to be developed to insure that the use of such data is focused on improving the effectiveness of programs rather than the evaluation of individual teachers.

H. How should the indicator data be collected? Members of the faculty?

All teachers felt that members of the faculty should be responsible for the collection of the data. No teacher expressed the opinion that the collection of dat should be undertaken by someone outside of the local school.

I. When in the academic year would it be suitable to:

1. revise objectives/indicators, develop proposed plans/budget and document these activities (by sub-program) in a school program memorandum?
2. collect indicator data and document in a program report?

Development of a program memorandum: Mid-year week in a released time situation (many teachers felt that this would provide sufficient time for review by both school and district administrators as well as allow sufficient lead time for the purchase of needed materials and equipment for the next academic year) Several teachers opted for an earlier planning time prior to December.

Collection of indicator data: Virtually all teachers felt that the end of the academic year was the only appropriate time.

J. Do school faculties as they are presently organized have time for PPBES?

Teachers overwhelmingly felt that PPBES as a planning activity was bound for failure without released time. Several teachers pointed out that the released time could be gained by a redistribution and grouping of planning days, including the post-planning period.

APPENDIX A: ALTERNATIVE PROPOSALS FOR A SCHOOL LEVEL PPBES PROPOSED BY PARTICIPANTS

Alternative A: Maximal Community Involvement/Control

Planning: The local school administration during each year selects a representative committee composed of lay persons from each school community. This committee has the responsibility to identify the critical instructional needs in the community and to insure their consideration in the school plan and budget. The assistant principal for curriculum in each school is an ex-officio member of the committee and coordinates the work of the committee with the planning and budgeting activities of the school administration and faculty.

Programming: After an explicit identification of school needs by the committee, teachers in each department develop a program plan, including objectives/indicators relating to the identified needs, the activities required for the attainment of the objectives, and needed resources. The program plans are presented by the school principal to the lay committee who makes a final determination of the program budget.

Evaluating: The evaluation of the plans will be supervised by the committee. Quantitative and qualitative data (indicator data) expressing the attainment of program objectives will form the basis for the evaluation and will be collected by the teachers themselves under the leadership of the assistant principal for curriculum.

Alternative B: Maximal Teacher Involvement/Control

Planning: Teachers in each school department identify the critical needs of the departmental sub-program for the next academic year in a document. A similar activity is undertaken on a school-wide basis by a committee composed of department chairmen and the administrative staff. This activitiy is aided by community needs data derived from a formal survey of parents and students included in the school area. The principal with the school committee as an advisory body identifies priority goals for school planning and budgeting for the next academic year based on identified community-school needs. However, the faculty as a whole by a two-thirds vote may override the priority ranking of planning goals determined by the principal.

Programming: After the principal has determined the amounts and types of resources available to each department, departments identify objectives/indicators relating to departmental needs as well as behavioral strategies to provide for their attainment. Plans for school-wide needs are developed by the school-wide planning committee.

Evaluating: Evaluation is accomplished principally by the collection of indicator data by teachers themselves under the supervision of the administrative staff.

APPENDIX B: DAILY AGENDAS FOR SEMINAR

AGENDA

Monday June 22, 1970

Anticipated Outcomes
A basic understanding of PPB theory and methodology, particularly as it might affect planning and budgeting in Education at the school system level.

Welcome and Introductions -- Mr. J. Troy Earhart	8:30 A.M.
Clarification of Seminar Schedule and Procedures Mr. Earhart	8:45 A.M.
Overview of PPB (Rationale, Economics, History) Mr. Stan R. Corces	9:00 A.M.
COFFEE BREAK: 9:45 - 10:15 A.M.	
PPB in Education: The ASBO Model (slide tape presentation) -- Dr. William H. Curtis	10:15 A.M.

LUNCH: 11:30 A.M. - 12:30 P.M.

Review of Other Developments in Education (Fels, CASBO, Philadelphia) -- Mr. Richard H. Hinds	12:45 P.M.
The Dade PPBES (Elements and Development) -- Mr. Earhart	1:30 P.M.
COFFEE BREAK: 2:15 - 2:45 P.M.	
The Role of PPB in Education (Discussion Groups with Designated Leader)	2:45 P.M.
Session Evaluation	3:30 P.M.

AGENDA

Tuesday June 23, 1970

Anticipated Outcomes
An understanding of the types of objectives/indicators which are most useful in an educational PPBES.
The capacity to define PPBES objectives/indicators for a sub-program in which one has teaching responsibility

Clarification of PPB Theory and Methodology Session Based on Participant Evaluation -- Mr. Earhart	8:30 A.M.
The Types of Objectives/Indicators in an Educational PPBE System -- Mr. Hinds	9:00 A.M.
COFFEE BREAK: 10:00 - 10:30 A.M.	
Strategies for Defining Educational Objectives/Indicators -- Mr. Hinds	10:30 A.M.
Clarification of Participant Responsibilities for Defining Objectives/Indicators -- Mr. Earhart	11:00 A.M.

LUNCH: 11:15 A.M. - 12:15 P.M.

Development of First Draft Sub-program Objectives/ Indicators in Work Groups -- PPBES staff and participating consultants will be available	12:15 P.M.
COFFEE WILL BE AVAILABLE AS NEEDED THROUGHOUT THE AFTERNOON	
Critique of First Draft Sub-program Objectives/ Indicators by Teachers of Related Sub-programs	2:30 P.M.
Session Evaluation	3:30 P.M.

AGENDA

Wednesday June 24, 1970

Anticipated Outcomes
Completion of draft Objectives/Indicators and submission to PPBES staff
Knowledge of a PPBES proposal for a school level Program Planning, Budgeting, and Evaluating System
Capacity to simulate the development of a school level Program Memorandum as part of a group of teachers

Clarification of Types of Objectives/Indicators and Strategies of Definition Based on Participant Evaluation Mr. Hinds	8:30 A.M.
Revision and Completion of Draft Objectives/Indicators by Participants Based on Teacher Critique -- PPBES staff and participating consultants will be available	9:00 A.M.
COFFEE WILL BE AVAILABLE AS NEEDED THROUGHOUT THE MORNING	
Submission of Draft Objectives/Indicators to the PPBES Staff	11:30 A.M.

LUNCH: 11:30 A.M. - 12:30 P.M.

A Proposal for PPBES at the School Level (Components, Schedule, Responsibilities) -- Mr. Earhart	12:30 P.M.
Simulating the Development of an Elementary School Program Memorandum (Description of Hypothetical School, Assignment of Roles, Clarification of Possible Strategies) -- Mr. Hinds and assigned teachers with participating consultants	
or	
Simulating the Development of a Junior High School Program Memorandum (Description of Hypothetical School, Assignment of Roles, Clarification of Strategies) -- Mr. Earhart and assigned teachers with participating consultants	1:15 P.M.
COFFEE BREAK: 2:00 - 2:30 P.M.	
Development of Simulated Program Memorandum (Elementary and Junior High School) Based on Determined Roles and Strategies by Participants	2:30 P.M.
Session Evaluation	3:30 P.M.

AGENDA

Thursday June 25, 1970

Anticipated Outcomes
Completion of a simulated Program Memorandum by participants and submission to PPBES staff
The development of a better data base regarding the feasibility and type of PPBES at the school level

Clarification of Proposal for School Level PPBES Based on Participant Evaluation -- Mr. Earhart	8:30 A.M.
Completion of a Simulated Program Memorandum (Elementary and Junior High School) by Participants	9:00 A.M.
COFFEE BREAK: 10:00 - 10:30 A.M.	
Submission of Completed Program Memorandum to PPBES Staff	11:00 A.M.
The Pros and Cons of the Proposal for School Level PPBES -- Participating Consultants	11:05 A.M.

LUNCH: 11:45 A.M. - 12:45 P.M.

The Pros and Cons of the Proposal for School Level PPBES -- Participating Teachers	12:45 P.M.
Development of Alternate Models for School Level PPBES by Work Groups (3) -- PPBES staff will be available	1:00 P.M.
COFFEE BREAK: 2:00 - 2:30 P.M.	
Presentation of Alternate Models for School Level PPBES -- designated work group leader	3:00 P.M.
Session Evaluation	3:30 P.M.

AGENDA

Friday June 26, 1970

Anticipated Outcomes
Documentation of a data base regarding the feasibility and type of PPBES at the school level
Completion of a model set of sub-program Objectives/Indicators

Comprehensive Analysis in Writing by Each Participant of PPBES at the School Level	8:30 A.M.
COFFEE WILL BE AVAILABLE AS NEEDED THROUGHOUT THE MORNING	

LUNCH: 11:30 A.M. - 12:30 P.M.

Revision of Draft Objectives/Indicators Based on PPBES Recommendations by Each Participant	12:45 P.M.
COFFEE WILL BE AVAILABLE AS NEEDED THROUGHOUT THE AFTERNOON	

APPENDIX C: PARTICIPANT EVALUATION OF THE TRAINING ASPECTS OF THE SEMINAR

1. In general, I found the presentation of materials today to be:

	Mon.	Tues.	Wed.	Whole Seminar
exceptionally clear and lucid	4	4	4	4
generally clear with some unclear points	9	9	11	13
somewhat mixed as to clarity	6	3	3	1
very difficult at times to follow	1	1	1	0
very confusing	0	0	0	0

2. The session as a whole was a bore.	0	0	0	0
I found this session to be one of the more stimulating short-term orientations I have ever attended.	1	2	2	8
This institute had very interesting and very dull moments.	10	3	5	3
Unfortunately, I found this training session to be more boring than stimulating.	1	0	0	0
I found this session to be mainly interesting.	8	12	12	8

3. I would characterize this training session as compared to other (sessions/institutes)				
somewhat the same in clarity and interest	-	7	9	4
far superior	-	1	1	8
about the worse I have attended to date	-	0	0	0
not up to the quality of the other sessions (seminars)	-	1	1	0
better than the other sessions (seminars)	-	8	8	7

4. Seminar accomplishment of anticipated outcomes (participant rating)

A basic understanding of PPB theory and methodology, particularly as it might affect planning and budgeting in Education at the school system level. (Monday Session)

Accomplished in the main: 15 Dismal flop: 0

Not well met: 3 Outstanding: 1

Minimal: 1

APPENDIX C: Number 4 (Continued)

An understanding of the types of objectives/indicators which are most useful in an educational PPBES.

The capacity to define PPBES objectives/indicators for a sub-program in which one has teaching responsibility. (Tuesday Session)

Accomplished in the main:	13	Dismal flop:	0
Not well met:	4	Outstanding:	0
Minimal:	0		

Knowledge of a PPBES proposal for a school level Program Planning, Budgeting, and Evaluating System. (Wednesday Session)

Capacity to simulate the development of a school level Program Memorandum as part of a group of teachers.

Accomplished in the main:	15	Dismal flop:	0
Not well met:	4	Outstanding:	0
Minimal:	0		

Final evaluation of whole seminar accomplishment.

Accomplished in the main:	13	Dismal flop:	0
Not well met:	0	Outstanding:	6
Minimal:	0		

APPENDIX E

THE BILINGUAL PROGRAM SECTION OF PROGRAM MEMORANDA FOR FISCAL YEAR 1971-72

BILINGUAL PROGRAM

Rationale

Large concentrations of Spanish-speaking pupils with little ability to communicate in English are presently enrolled in Dade County Public Schools. This group of students, composed primarily of Cuban refugee children,* cannot profit adequately from the regular program of instruction because of their unique socio-linguistic needs. In September 1970, the total number of Spanish-language-origin students in the public schools was listed as 49,379.** Of these, 20,124 were "new" Cuban refugees, that is, children who have entered the U.S.A. since October 3, 1965; approximately 13,000 were identified as "old" Cuban refugee children, or pupils who had entered continental U.S.A. on or prior to October 3, 1965.†

Dade County Public Schools provides a special program of bilingual education to enable these children to acquire fluency in English and literacy in their native Spanish. For those with limited control of English, classes in English-as-a-Second-Language (ESL) are provided to complement the system's regular language arts program; 34% of the Spanish-language-origin children are in such classes. A little less than 25% of the Spanish-speaking students in the system participate in the second special area of Spanish-S provided to maintain or develop language arts skill in their native language. Spanish-S is made available also to native English speakers who are proficient in Spanish.

Another facet of bilingual education is found within 4 bilingual schools where instructional programs in English and Spanish for native English- and Spanish-speakers are designed to produce bilingual/bicultural students. Some 5% of Dade County's Spanish-language-origin pupils participate in such bilingual programs.

Spanish-speaking pupil personnel services workers are incorporated within the Bilingual Program. Pupils thereby receive supplementary guidance and counseling to facilitate their adjustment to the school environment.

Classes in English-for-the-Foreign-Born are provided to adults registered in the Continuing Education Program of the Vocational, Technical and Adult District.

*Administrative Research Report, Vol. XVIII, No. 10, 1970-71, Cuban Refugee Report Number Nine, Dade County Public Schools, Miami, Florida, December 1970.

**Administrative Research Report, Vol. XVIII, No. 11, 1970-71, Spanish-speaking Pupils in the Dade County Public Schools, Miami, Florida, March 1971.

†Communication from Administrative Research Office.

PROPOSED BUDGET BY OBJECT*
(THOUSANDS OF DOLLARS)

	EMP.	BUDGET
Salary—Teachers	51	$ 511.0
Salary—Psychological Personnel	9	99.0
Salary—Attendance Personnel	16	179.1
Salary—Other Instructional Personnel	4	52.8
Salary—Vocational/Adult—Teachers	1	10.0
Salary—Substitute Teachers	—	10.2
Salary—Cuban Aides	270	1,352.5
Car Allowance	2	15.2
Salary—Cuban Aides (PT)	—	46.7
Teaching Supplies	—	90.0
New Equipment	—	40.0
Other Expenses**	—	.4
SUB TOTAL	353	$2,406.9
Special Program Shenandoah Junior High—Supplemental Appropriation		
Salary—Teachers	1	$ 10.0
SUB TOTAL	1	$ 10.0
TOTAL	354	$2,416.9

*Includes only appropriations above the regular school staffing.

**Other Expenses includes accounts: 2263.00; 2264.00

245

BILINGUAL PROGRAM

Trends and Services, 1970-71

In schools where over 100 non-English-speaking pupils are enrolled, special staffing was provided to develop special instructional and support programs. In 1970-71, ESL classes in 115 schools provided a total of 16,996 pupils in grades K-12 with instruction designed to aid Spanish-speaking children in gaining proficiency in the use of oral and written English.

As housing patterns changed for families of Cuban origin, ESL classes were introduced into additional schools in the South, Southwest, North Central, and Northwest Districts. Grouping or pairing of schools in 1970-71 required extension of services to 13 additional schools, making a total of 40 schools served in the South Central District alone.

In 72 elementary schools, each with 100 or more Spanish-speaking students in grades 3-6, Spanish-S instruction was provided to 7,067 children during 1970-71. Spanish-S also served 2,314 middle/junior high and 2,892 senior high school students.

Moreover, an additional 2,251 students (1,760 elementary pupils and 491 middle/junior high students) participated in ESL and Spanish-S instruction within bilingual schools in 1970-71.

Bilingual teachers on special assignment aided school administrators and teachers to implement programs in four districts. Also, 31 Spanish-speaking pupil personnel services workers were incorporated within the Bilingual Program. Pupils received supplementary guidance and counseling to facilitate their adjustment to school from 21 bilingual visiting teacher-counselors and 10 assistant psychologists. An inservice training course and 10 workshops were conducted for teachers and aides. Community involvement was reflected in the activities of the ad hoc Advisory Committee on the Education of Spanish Speakers, a committee made up of community representatives. Classes in English for the Foreign Born were provided to 19,000 adults registered in 11 adult centers in the Continuing Education Program of the Vocational, Technical and Adult District.

The Bilingual Program (ESL, Spanish-S, plus bilingual school programs within 4 bilingual schools) served 31,520 pupils during the 1970-71 school year.

Initial evaluative data concerning the "bilingual schools" component of the instructional program for Spanish-language-origin students in Dade County Public Schools indicate that this program has successfully attained some of its objectives for Spanish-language-origin students. No recent evaluative data are available concerning either the English-SL component or the Spanish-S component.†

†Based on a recent evaluative study of the instructional program for Spanish-language-origin students, prepared by the Department of Program Evaluation, Dade County Public Schools.

BILINGUAL PROGRAM: K–12

NUMBER OF STUDENTS SERVED IN BILINGUAL PROGRAM SITUATIONS

	Actual 1970-71			
	Elementary	Middle/Junior High School**	Senior High School**	Total
English-as-a-Second-Language (ESL)	11,954*	4,106	936	16,996
Spanish for Native Speakers (Span.-S and S-SL)	7,067*	2,314	2,892	12,273
Bilingual Schools†	1,760	491	—	2,251

NUMBER OF STUDENTS POTENTIALLY ELIGIBLE FOR SERVICES

	Actual	
"New" Cuban Refugees††	20,124	
"Old" Cuban Refugees††	13,050	
Spanish Language Origin+	49,379	(Spanish-language-origin students enrolled in Dade County Public Schools, including the actual "new" and "old" Cuban refugee child en totaled above)

*Administrative Research Report, Vol. XVIII, No. 11, 1970-71, Spanish-speaking Pupils in the Dade County Public Schools, Miami, Florida, March 1971.

**Source: Administrative Research Office, per survey of October 1970. This statistic represents the number of students formally registered in courses officially termed ESL (state code: 5110 or 5117) or Spanish-S (state code: 7509). The number of secondary school students reported to be receiving some form of instruction in these programs is higher (see Spanish-speaking Pupils in the Dade County Public Schools).

†Includes students in ESL and Spanish-S within these schools: Coral Way Elementary, Leroy D. Fienberg Elementary, Key Biscayne Kindergarten, Ida M. Fisher Junior High, and Shenandoah Junior High.

††Communication from Administrative Research Office.

+Administrative Research Report, Vol. XVIII, No. 5, 1970-71, Desegregation–September 1970, Dade County Public Schools, Miami, Florida, December 1970. Includes all students of Spanish-language-origin enrolled in Dade County Public Schools.

BILINGUAL PROGRAM

Program Improvements Planned for 1971-72

Program improvements include the expansion of Spanish-S to additional schools that will meet minimum enrollment requirements. Additional teacher aides are projected to serve these schools. Refinement of teaching techniques in existing bilingual schools will take place by way of inservice training for ESL teachers and aides and by implementation of the Education Professions Development Act-sponsored *Teacher Training Coordinating Capability* at Coral Way Elementary School, scheduled to begin July 1971. Certification requirements do not now differentiate between teachers of Spanish who are assigned to native English speakers and those assigned to native Spanish speakers. Therefore, support efforts will include intensive inservice training for individual teacher needs.

Innovative instructional materials developed by the Spanish Curricula Development Center are ready for countywide distribution at the beginning of the 1971-72 school year. The addition of Spanish books and audio-visual materials in school media centers is also projected. The TV orientation series in English and Spanish will be expanded by additional presentations and by new productions.

The ad hoc Advisory Committee will continue to serve in liaison capacity, supporting planned instructional programs and improvements for students in the Bilingual Program.

PROPOSED BUDGET BY TYPE OF CENTER (THOUSANDS OF DOLLARS)

Type of Center	Division of Instruction		Voc/Tech/Adult Educ. Division		Northeast District		Northwest District		North Central District		South Central District		Southwest District		South District		Totals	
	Emp.	Budget	Emp.	Budget	Emp.	Budget	Emp.	Buoget	Emp.	Budget	Emp.	Budget	Emp.	Budget	Emp.	Budget	Emp.	Budget
Elementary School Center	—	—	—	—	14	$ 85.7	27	$ 140.2	34	$ 196.1	95	$ 584.6	18	$ 90.0	2	$ 10.0	190	$ 1,106.6
Middle/Junior High School Center	—	—	—	—	5	30.2	13	85.9	8	45.2	38	242.2	7	40.2	1	5.0	72	448.7
Senior High School Center	—	—	—	—	2	10.0	3	15.0	7	40.2	11	70.7	4	20.0	—	—	27	155.9
Non-School Instructional Center	—	$ 130.0	18	$ 149.0	—	—	—	—	—	—	—	—	—	—	—	—	18	279.0
District Support Center	—	—	—	—	3	22.9	5	30.9	4	41.6	25	231.1	6	57.1	1	12.5	44	396.1
System Support Center	2	$ 20.6	—	—	—	—	—	—	—	—	—	—	—	—	—	—	2	$ 20.6
TOTAL	2	$ 150.6	18	$ 149.0	24	$ 148.8	48	$ 272.0	53	$ 323.1	169	$ 1,128.6	35	$ 207.3	4	$ 27.5	353	$ 2,406.9

BILINGUAL PROGRAM:
SUPPLEMENTAL APPROPRIATION

Special Program—Shenandoah Junior High School

This allocation for an additional teacher to provide bilingual classes for English-speaking students is an extension of the bilingual program at Coral Way Elementary School. Ten thousand dollars has been requested for an additional professional staff member for this program.

BILINGUAL PROGRAM:
CONTRACTED PROJECT

Title VII ESEA Bilingual
Bilingual Education Project

This project creates and field-tests primary school Spanish curricular materials for use in bilingual education programs across the nation. Project personnel have produced multidisciplinary, multimedia bilingual education kits that have been field-tested by students at Coral Way and Leroy D. Fienberg Elementary Schools. Inservice workshops are now being conducted in 20 school centers across the nation which will field-test the bilingual education kits during the 1971-72 school year. This project was funded for $499,787 during the grant period of 6-22-70 to 6-30-71; $560,000 has been requested from Title VII ESEA to continue the project during 1971-72.

APPENDIX F

SAMPLE BUDGET PRINTOUT--BILINGUAL PROGRAM

D A D E C O U N T Y P U B L I C S C H O O L S
ANNUAL BUDGET FOR FISCAL 1971-72
APPROPRIATION ANALYSIS BY PROGRAM
-COUNTY LEVEL-

PGR CLS 11 BILINGUAL

CONTROLS TYPE	NO.	TITLE	PROJECTED BUDGET NEXT YEAR DOLLARS/CTS.	EMP.	EXPENSES THIS YEAR DOLLARS	EMP.	VARIANCES DOLLARS/CTS.	EMP.
PRG NO	6600	BILINGUAL						
ACCOUNT	2211.10	SAL-COORDINATORS/SUPVRS/CONSLTS						
R/C TYPE	7	SYSTEM SUPPORT CTR.	17,054.00	1.0				
ACCOUNT	2213.00	SALARY-TEACHERS						
R/C TYPE	1	ELEMENTARY SCHOOL CENTER	300,600.00	30.0				
	2	MIDDLE/JUNIOR HIGH SCH. CTR.	170,340.00	17.0				
	3	SENIOR HIGH SCHOOL CENTER	40,080.00	4.0				
	2213.00	TOTAL.....	511,020.00	51.0				
ACCOUNT	2214.40	SALARY-PSYCHOLOGICAL PERS.						
R/C TYPE	8	DISTRICT SUPPORT CTR.	111,728.00	10.0				
ACCOUNT	2214.50	SALARY-ATTENDANCE PERS.						
R/C TYPE	8	DISTRICT SUPPORT CTR.	179.141.00	16.00				
ACCOUNT	2214.90	SALARY-OTHER INSTR.						
R/C TYPE	7	SYSTEM SUPPORT CTR.	13,750.00	1.0				
	8	DISTRICT SUPPORT CTR.	39,025.00	3.0				
	2214.90	TOTAL.....	52,775.00	4.0				
ACCOUNT	2215.30	SALARY-VOC/ADULT-TEACHERS						
R/C TYPE	6	NON-SCHOOL INSTR. CENTER	9,960.00	1.0				
ACCOUNT	2221.60	SALARY-CUBAN AIDES						
R/C TYPE	1	ELEMENTARY SCHOOL CENTER	795,000.00	159.0				
	2	MIDDLE/JUNIOR HIGH SCH. CTR.	275,000.00	55.0				
	3	SENIOR HIGH SCHOOL CENTER	115,000.00	23.0				
	6	NON-SCHOOL INSTR. CENTER	92,338.00	17.0				
	7	SYSTEM SUPPORT CTR.	6,689.00	1.0				
	8	DISTRICT SUPPORT CTR.	63,516.00	14.0				
	2221.60	TOTAL.....	1,347,543.00	269.0				
ACCOUNT	2221.63	SALARY-CUBAN AIDES (PT)						
R/C TYPE	6	NON-SCHOOL INSTR. CENTER	46,680.00					
ACCOUNT	2251.00	TEACHING SUPPLIES						
R/C TYPE	6	NON-SCHOOL INSTR. CENTER	90,000.00					

251/251
251

DADE COUNTY PUBLIC SCHOOLS
ANNUAL BUDGET FOR FISCAL 1971-72
APPROPRIATION ANALYSIS BY PROGRAM
-COUNTY LEVEL-

PGR CLS 11 BILINGUAL

CONTROLS TYPE	CONTROLS NO.	TITLE	PROJECTED AMOUNTS BUDGET NEXT YEAR DOLLARS/CTS.	BUDGET NEXT YEAR EMP.	EXPENSES THIS YEAR DOLLARS	EXPENSES THIS YEAR EMP.	VARIANCES DOLLARS/CTS.	VARIANCES EMP.
PRG NO	6600	BILINGUAL						
ACCOUNT	2261.17	CAR ALLOW-INSTR.						
R/C TYPE	7	SYSTEM SUPPORT CTR.	250.00					
	8	DISTRICT SUPPORT CTR.	16,400.00					
	2261.17	TOTAL.....	16,650.00					
ACCOUNT	2263.00	OFFICE SUPPLIES-INSTR.						
R/C TYPE	8	DISTRICT SUPPORT CTR.	300.00					
ACCOUNT	2264.09	OTHER PERSONNEL SERV-SUB TEACHERS						
R/C TYPE	1	ELEMENTARY SCHOOL CENTER	6,000.00					
	2	MIDDLE/JUNIOR HIGH SCH. CTR.	3,400.00					
	3	SENIOR HIGH SCHOOL CENTER	800.00					
	2264.09	TOTAL.....	10,200.00					
ACCOUNT	2844.01	NEW EQUIP-OTHER (LCIF)						
R/C TYPE	6	NON-SCHOOL INSTR. CENTER	40,000.00					
PRG NO	6600	TOTAL.....	2,433,051.00	352.0				
PRG NO	9470	SPEC. PRG-SHENANDOAH JR.						
ACCOUNT	2213.00	SALARY-TEACHERS						
R/C TYPE	2	MIDDLE/JUNIOR HIGH SCH. CTR.	10,000.00	1.0				
PRG NO	9470	TOTAL.....	10,000.00	1.0				
PRG NO	9670	SPEC. PRG. - CUBAN REFUGEE						
ACCOUNT	2251.00	TEACHING SUPPLIES						
R/C TYPE	9	MISC. CTR.	10,663.00					
PRG NO	2251.00	TOTAL.....	10,663.00					
PRG CLS	11	TOTAL.....	2,453,714.00	353.0				

256
252

APPENDIX G

THE NORTHWEST DISTRICT OFFICE SECTION OF
PROGRAM PLANS: DISTRICT PROGRAMS 1971-72

DISTRICT/DIVISION SUMMARY STATEMENT

District/Division: NORTHWEST DISTRICT	Prepared by: R. Roberts	Reviewed by:	Date: 3/31/71

The Northwest District Office functions to provide administrative direction, educational leadership and various pupil personnel services to 26 elementary, 6 junior high, 2 senior high schools, two special schools, one reading center and one curriculum center. These schools serve 38,200 students in a geographic area covering approximately 400 square miles.

Elementary Schools

In the fall of 1971 one new elementary school will open. No major changes in pupil personnel services are planned at this time; however, some changes in housing and a reassignment of schools may take place. Due to the rapid development of housing projects throughout the district, but especially in the Carol City area, housing of students is rapidly becoming a critical problem at the elementary, junior and senior high school levels.

By court order, two of our elementary school boundary lines were changed and three elementary schools were paired to facilitate integration. Three district reading teachers have given service to over 14,000 pupils and 600 teachers in the elementary schools. Two district arithmetic teachers have worked closely with 600 teachers involving 250 demonstrations and 4500 pupil diagnoses. Early Childhood Education Services were also provided. In the past two months (since the addition of a special teacher), there have been 46 conferences and 15 demonstrations and numerous visits to schools.

A study of the Quinmester Program will be undertaken in order to assure effective implementation at the elementary level in the future. County test results will be examined to determine curriculum improvement.

Junior High Schools

A major need is that of providing adequate facilities to house the student population since most of the junior high schools are overcrowded and operating at maximum capacity. There was one junior high school demonstration as a result of integration. Two junior high schools will be inaugurating the Quinmester Program in the fall of 1971 requiring special needs and services.

Two junior high schools operated on the 10-hour day. The elimination of an optional attendance zone in one junior high school was accomplished.

There may be additional integration efforts in one junior high school by bussing in black students from the Brownsville area. No major curriculum changes are contemplated but county test results will be examined to determine any improvements necessary.

FORM 20

Effective: July 1, 1971

District/Division: NORTHWEST DISTRICT

Senior High Schools

In the fall of 1971, one new high school will open, placing many demands upon district office personnel as well as the administrative staff of the school. As a result of the new senior high school, it will be necessary to reassign pupil personnel. A demonstration, as a result of integration, occurred at a senior high school.

One senior high school operated successfully on the 10-hour day, thus alleviating the acute housing situation at the secondary level.

In intensifying services to improve the instructional program test results will be examined to determine any curriculum changes and/or improvements.

Adult Programs

The existing adult education program at Hialeah Senior High School will be continued.

It is hoped that a Community School Program may be initiated at Miami Carol City Senior High School and at Hialeah-Miami Lakes Senior High School.

Special Schools

Pilot House

The Pilot House Program is an experimental venture into effecting specific, practical intervention techniques for a segment of Dade County's many disturbed and/or disturbing (maladaptive) elementary school age children. As such, the program's two primary objectives are (1) the development of varied intervention techniques for application in the Pilot House School and (2) the further modification of these techniques for practical application in the regular elementary school setting.

Junior High Opportunity Center

The goals of the school are multi-faceted. Of course, academic improvement in the form of higher achievement is important. But, equally important, it is hoped that the pupil who has come to think of himself as a failure in school and at odds with society's institutions in general will respond to a "second chance" by re-evaluating his basic attitudes concerning school and society. Most important, through participation in this success oriented program which fully accepts him as he is, the pupil should develop increased confidence in his ability to learn, and a greater appreciation of himself as an individual of worth. The underlying philosophy of the school might best be characterized by three words....flexibility, innovation, and individualism. Needless to say, the twenty-one school centers in the Northwest, North Central, South Central Districts serviced by the program are relieved of their socially maladjusted or most disruptive male students.

SUPERVISOR/DIVISION SUMMARY STATEMENT

Supervisor/Division: [redacted]	Prepared by: R. Roberts	Reviewed by:	Date: 3/31/71

Function Review

In the fall of 1971 an addition opening a one eight million dollar high school and two elementary buildings. This will place many demands upon the office personnel.

The division superintendent and three directors provide direction for the program planning and management of the education operations of the District's schools by insuring the implementation of school system policies and coordinating services provided by central office personnel. Specific activities entail assessing principals in establishing effective school organization, improving the instructional programs through innovative materials and teaching techniques, and administering special programs. The development and maintenance of a sound community relations program is a continuous effort.

District office personnel provide district-wide supervision, educational leadership and coordination for pupil personnel services as well as for special education programs within the district. The personnel also effects decentralized assistance to central office personnel in developing systemwide plans for these programs, and provides consultant services and technical assistance to individual schools as required.

Specialist services are provided by 9 psychologists, 11 visiting teachers and 2 guidance consultants. These services include diagnoses and treatment prescriptions for students with special problems, assistance to elementary and secondary school staffs in developing adequate guidance programs, maintaining satisfactory school attendance and promoting home-school competence. During 1969-70, 930 psychological referrals were processed by psychologists and 8,000 home visits were made by visiting teachers. In addition, there is a Special Education Coordinator who supervises the activities of 21 special education teachers in one elementary and one junior high center as well as 42 teachers assigned to special education classes in schools throughout the district.

The district office staff also includes 2 special teachers (1 reading and 1 arithmetic specialists) who directly assist elementary teachers in the improvement of programs and teaching competencies through staff development programs and demonstration teaching. Assistance to beginning teachers is a predominant aspect of these services.

Five teachers in two schools operate reading centers which provide activities for students who are severely disabled in reading and who require individual or very small group instruction.

Many psychological services were provided. Guidance services resulted in a special television demonstration program, inservice tours, over 100 visits by the guidance association, numerous meetings ranging from human relations to inclusive programs, and over 1000 conferences by the district elementary counselor.

FORM 20
Effective: July 1, 1971

Department Objectives: [illegible]

Objective planning and support functions establish needs for additional schools and determine sites for those schools in cooperation with county level planning groups, assist principals in getting schools operational and provide services necessary to operate sound educational programs. Planned changes, geared to established district-wide and school level priorities and the development of the capability to identify weaknesses and deal with problems, are major concerns of the district office.

The district office will continue in its efforts to bring management services closer to the community by continuing and strengthening the region office approach.

The Human Relations Program initiated in 1968-69 will be continued with district personnel assuming greater responsibility for conducting this program. We plan to continue utilizing consultant services to the degree necessary to maintain and improve those efforts. An evaluative study of this program will be conducted to guide us in the allocation of resources for similar purposes in the future.

No major changes in pupil personnel services are planned at this time; however, some changes in housing and a reassignment of schools may take place.

In the field of curriculum, no major changes are contemplated, but we expect to intensify our services in order to further improve instructional program content. Pupil test results will be examined to determine curriculum improvement.

A major need continuing the district is one of providing adequate facilities to house the student population inasmuch as most schools are overcrowded and operating at maximum capacity.

Another area which will require special attention and services is that of the Quinmester Program.

PROGRAM PLANS

Classification Number	Responsibility Center Name	Code Number	Program Name	Code Number	Prepared by	Reviewed by	Date
	Northcastle District Office	99501	Instructional Development	7100	M.E. Hagenmiller	R. Roberts	4/1/71

SUMMARY REVIEW OF CURRENT YEAR OPERATIONS

a. Reading Services

Three district reading teachers have given service to over 12,000 pupils and 500 teachers. Their services have included the study and followup of the task results in all 26 elementary schools. They have met with district psychologists as well as district reading center personnel in assigning the needs of children in the area of reading. They have made faculty and P.T.A. presentations. They have helped a senior high school English teacher plan a remedial reading program for students with severe reading problems.

In addition to serving the schools, district reading teachers (with county Staff Development Personnel and the county Reading consultant) have planned and actively participated in workshops and seminars for the 18 district corrective reading teachers, 15 assistant principals and 7 district reading center personnel.

District reading teachers are members of the District Curriculum Council planning committee.

Currently, the three district reading teachers are actively involved in the county Program Evaluation under Dr. William Iman.

In addition, two of the district reading teachers are participating in the county and state assessment program.

b. Mathematics Services

Each district mathematics teacher serves 13 schools.

Three district mathematics teachers have been involved in over 250 demonstrations. They have diagnosed 4500 pupils. They have worked very closely with 300 teachers (individually and in groups) and with 15 assistant principals. After careful study of the county tests, they have helped plan mathematical needs for individual classes.

They have equipped and provided instructional materials for all 26 elementary schools. They have provided faculty inservice demonstrating techniques as well as making manipulative materials for teaching specific skills.

One mathematics teacher is responsible for coordinating the pre and post testing of the district teachers viewing the Proofs and Improve M.A. mathematics program.

In addition, the 3 district mathematics teachers are currently participating in the county assessment program.

FORM 30A
Effective: July 1, 1971

PROGRAM PLANS

Identification Section	Responsibility Center Name	Code Number	Program Name	Code Number	Prepared by	Reviewed by	Date
	Northwest District Office	9521	Instructional Development	7100	M.K. Hagenmuller	R. Roberts	4/1/71

SUMMARY REVIEW OF CURRENT YEAR OPERATIONS

3. Taba Strategies

One elementary reading teacher has served (part time) in teaching teachers Taba (social studies) strategies. He has given individual and group demonstrations as well as in-service programs to faculty groups. He has trained 45 teachers representing 6 schools. If at all possible, it is hoped to use him exclusively as a trainer in Taba strategies in the elementary schools.

4. Early Childhood Education Services

The district early childhood education teacher was added to the district curriculum center staff in the second semester.
She has visited and conferred with the 46 kindergarten teachers in the 26 elementary schools.
She has given over 75 demonstrations. She has held 2 curriculum meetings involving the sharing of techniques. She has planned 2 more meetings during which perceptual skills and concepts are to be demonstrated. All 46 kindergarten teachers are to be involved.
She is serving as liaison between district and county in two kindergarten Pilot Programs (one involves the two Miami Garden kindergarten teachers; the other involves 7 northwest district administrators in an Early Childhood Education Seminar for administrators).

5. The Bilingual Education Services

This teacher works out of the district curriculum center. Her responsibilities are to help the 32 E.S.L. specialists and Cuban aides in the elementary and secondary schools to develop desirable techniques and practices. She has assisted schools in the processing of newly enrolled spanish speaking children.
She is currently conducting an inservice workshop for district elementary and secondary Cuban aides.

6. Special Education Services

This teacher has served 44 special education teachers and has visited 21 elementary schools. She has demonstrated desirable techniques by using suitable materials and media.
She has held 3 curriculum and technique sharing meetings with all the district special education personnel.

PROGRAM PLANS

Identification Section	Responsibility Center Name	Code Number	Program Name	Code Number	Prepared by	Reviewed by	Date
	Northwest District Office	9521	Instructional Development	7100	M.K. Hogenmuller	R. Roberts	4/1/71

SUMMARY REVIEW OF CURRENT YEAR OPERATIONS

7. Drug Abuse Services

This teacher has served (part time) the district elementary and secondary schools. She has functioned in the capacity of a resource person e.g., providing materials, talking to faculties and parent organizations. She has served in a consultant capacity helping teachers plan suitable drug abuse programs.

8. District Reading Center

This center consists of one head reading teacher and 4 reading teachers. They have diagnosed over 250 pupils. They have had over 2,000 teaching sessions and at present their active toll is 121 pupils.

In addition to the diagnosis and remediation program, the reading center personnel under the direction of the head reading teacher are involved in an inservice program for the 18 corrective reading teachers. The purpose of this inservice program is to train the corrective reading teachers in one common evaluative screening device.

Currently, two reading center teachers are actively involved in the county Program Evaluation under Dr. William Inman.

DESCRIPTION OF PLANNED PROGRAM IMPROVEMENTS/CHANGES

In the fall of 1970, the curriculum center of the Northwest District was established to conduct the instructional improvement program. The curriculum center is housed at North Twin Lakes Elementary School and is staffed by a full time secretary and the following teachers on special assignment; 3 reading, 2 mathematics, 1 early childhood education, 1 bilingual, 1 special education and 1 (part time) drug abuse.

The district reading center is housed in two elementary schools. The main center is at Twin Lakes Elementary School with the head reading teacher and two other reading teachers and a secretary. This center serves the pupils in the southern area of the district. In the northern area, two reading center teachers are housed at Bunche Park Elementary School and serve the pupils in that area. The underlying purpose for this was to bring the service nearer to the pupils.

The district reading center is directly a concern and responsibility of the curriculum director.

There is no plan to change the structure of the curriculum center for 1971-1972. In order to determine the effectiveness of this particular structure, it is necessary to continue this operation one more year.

One major change planned is to intensify the reading, mathematics, Taba, bilingual education and early childhood education services in order to further improve instruction.

During September 1971, district curriculum personnel will study and analyze test results. Needs will be determined and plans developed to meet these needs. Changes will be reflected accordingly e.g., administering follow-up diagnostic tests, using teaching techniques to develop and strengthen needed skills, compiling and demonstrating materials helpful toward greater achievement.

Another plan is to provide inservice for the assistant principals. Since they are responsible in coordinating the curriculum within the school, it is important to keep them alert and sensitive to new trends and changes.

It is felt that a course in Taba strategies would be of great benefit since the technique of inquiry is basically a good teaching approach and could be applicable to reading as well as to other subjects in the curriculum.

In the fall, arrangements for this course would be made with the county staff development personnel. This course could be given by one of our own trained district teachers. Assistant principals would meet once a week one full semester.

A survey could also be conducted to determine the types of courses assistant principals perceive they need in order to be more effective as curriculum leaders.

A tabulation of these needs will be made and short term inservice sessions with district and county personnel will be planned.

Curriculum development must be an on-going program with continuous evaluation and re-evaluation.

IDENTIFICATION OF OBJECTIVES AND REQUIREMENTS

Responsibility Center Name: Northwest District Office	Code Number: 9521	Program Name: Instructional Development	Code Number: 7100

Objective	Activities	Indicators	Personnel Requirements					
			Code	2211.00	2214.90	2221.10		
			No.	1	8	1		
1. To orient and interest elementary school personnel in the use of desirable and innovative educational practices and materials from K-6.	Provide opportunity for teachers in the 27 elementary schools to visit the Curriculum Center and review any or all the state adopted books as well as samples of books other than state adopted. Display and discuss media and materials (films, filmstrips, cassettes, tapes, manipulative materials, learning kits, workbooks, sample tests and guidebooks) related to the following programs: reading, mathematics, early childhood education, social studies, special education, bilingual education and drug abuse. (over)	Number of teachers, assistant principals, principals who visit the curriculum center. Number of demonstrations involving teaching techniques and materials presented by selected representatives of publishing companies. Number of personnel attending demonstrations. Number of requests from school personnel for follow-up demonstrations or staff development activities.		35%	35%	20%		

FORM 30B

Effective: July 1, 1971

IDENTIFICATION OF OBJECTIVES AND REQUIREMENTS (Continued)

Objectives	Activities	Indicators	Personnel Requirements					
			Code					
			No.					
	Schedule demonstrations by county consultants and district staff personnel for teachers, assistant principals and principals.							

IDENTIFICATION OF OBJECTIVES AND REQUIREMENTS

Responsibility Center Name: Northwest District Office	Code Number: 9521	Program Name: Instructional Development	Code Number: 7100

Objective	Activities	Indicators	Personnel Requirements					
			Code No.	2211.00 1	2214.90 8	2221.10 1		
22. To provide or arrange for staff development activities for district personnel K-6.	Study test results of schools and list needs for instructional improvement especially in reading and mathematics. Follow up the above needs by presenting helpful techniques and demonstrations by district personnel and consultants to faculty groups as well as to individual teachers. Arrange faculty workshops by staff development and/or district personnel. Arrange training sessions in micro-teaching emphasizing the teaching act.	Number of short-term sessions e.g., faculty meetings and demonstration teaching conducted by district personnel. Percentage of short-term sessions at the request of school personnel. Number of staff development offerings conducted by staff development through arrangements by district personnel. Number of staff development requests made by school personnel and not fulfilled.		35%	35%	20%		

FORM 378

Effective: July 1, 1971

IDENTIFICATION OF OBJECTIVES AND REQUIREMENTS

Responsibility Center Name: Northwest District Office	Code Number: 9521	Program Name: Instructional Development	Code Number: 7100

Objective	Activities	Indicators	Personnel Requirements					
			Code	2211.00	2214.90	2221.10		
			No.	1	8	1		
III. Facilitate the installation of desirable curriculum practices and materials in the two new district elementary schools.* (1971 - 1972 only)	Study, analyze and tabulate test results with each faculty to identify needs. Help teachers administer additional diagnostic tests in order to provide a significant curriculum. Plan instructional program using tapes, cassettes, and micro-teaching to strengthen basic skills especially in reading and mathematics.	Number of demonstrations in the classrooms, per month, in the teaching of the basic skills. Number of conferences, per month, with individual teachers and groups of teachers. Number of requests by teachers.		10%	20%	5%		

*Lake Stevens is not a new school, but is moving into a new physical plant.

592

PROGRAM PLANS

Identification Section	Responsibility Center Name	Code Number	Program Name	Code Number	Prepared by	Reviewed by	Date
	Northwest District Office	9521	Pupil Personnel Services	7150	C. Walton	R. Roberts	4-1-71

SUMMARY REVIEW OF CURRENT YEAR OPERATIONS

1. Psychological Services

Four school psychologists and a special education school psychologist as of March 3, 1971, have given service to 986 pupils. The assistant psychologist 5 has been working with 67 pupils individually and in groups.

Each psychologist has addressed faculty groups and parent groups. In addition most pupil contacts have been followed by parent and school conferences. Psychologists plan their schedules to spend a day every other week in each of their assigned schools or one-half day per week in each school. Each psychologist has eight schools except the special education psychologist, who serves the four schools that house special education centers.

2. Visiting Teacher Services

A visiting teacher coordinator and eleven visiting teachers, plus a Cuban aide, serve Northwest District schools. One visiting teacher, provided through ESAP, works only with former Dorsey students at three junior high schools.

Visiting teachers have in addition to their regular home visits on attendance problems, worked extensively in a follow-up survey of students who had registered but failed to return to school because of school groupings, boundary changes and enforcement of boundaries. Requests for transfers have been carefully investigated and some permitted when adjudged that the requests met legal requirements for transfer. As of March 7, 650 home visits have been made, 687 social case histories have been compiled for psychological referrals, 201 transfers have been permitted, 29 have been received from other districts, 59 have been officially denied.

3. Guidance Services

The guidance specialist has made school visits, meeting with new counselors and the guidance staff of each secondary school to discuss their plans for improving the weaknesses they identified in their guidance programs. She has made 80 visits to the secondary schools, 32 visits to elementary schools, attended 5 guidance committee meetings, 1 principals' meeting, and addressed 1 parent group.

With the district special elementary counselor and a steering committee of representatives of elementary schools on elementary guidance, a T.V. demonstration was planned and executed which was viewed by all elementary schools followed by discussion groups in each school.

A district Vocational Guidance Steering Committee planned and implemented a program of four in-service tours of business or industry for the Vocational Guidance Council, which consists of one counselor and one student from each secondary school, and eight elementary teachers, in addition the assistant principal for Vocational Education from the two high schools assist in planning and program. The County Office of Vocational Education provides consultants and assistance for this program. Following tours of two types of industries related to public school vocational offerings, a panel discussion is held comprised of representatives working in the industry, a former

PROGRAM PLANS

Identification Section	Responsibility Center Name	Code Number	Program Name	Code Number	Prepared by	Reviewed by	Date
	Northwest District Office	9521	Pupil Personnel Services	7150	C. Walton	R. Roberts	4-1-71

SUMMARY REVIEW OF CURRENT YEAR OPERATIONS

student and a teacher. Slides are made and discussions taped for follow-up with students. This program was initiated by the guidance specialist with the pupil personnel coordinator as a consultant.

Information and sharing meetings have been held for guidance personnel as well as district-wide in-service meetings. The guidance specialist has served as a consultant to elementary schools in the development of their programs. Two meetings of elementary guidance committee chairmen were conducted by the guidance specialist.

The district elementary counselor has held 450 pupil conferences, 192 teacher conferences, 96 principal conferences, 80 psychologist conferences, 24 parent conferences, 88 conferences with school resource personnel, 24 agency conferences and has seen 345 students. He has worked with 7 faculty groups and has worked actively in developing the elementary guidance institute and assisted with the guidance committee and guidance program in which he works. He spends one day a week for six weeks in all but three of the 24 district elementary schools. He also is the liaison person between MacArthur School and the district elementary schools and assists in placement of pupils to Pilot House.

4. Pupil Personnel Services

Arrangements for in-service through Pupil Personnel Services have included the offering of the Deciders Program and a half-day program providing interest group and specialists in the various service areas as consultants. In addition, Max Birnbaum, Director of Boston Human Relations Laboratory, met for a half-day workshop session with all district pupil personnel workers.

All district office pupil personnel staff including the pupil personnel coordinator have served in individual schools as consultants to faculty and parent groups. This staff meets monthly for staff development and information as well as each individual staff member meeting for individual conferences with the pupil personnel coordinator.

The pupil personnel coordinator serves as the liaison person with the County Office of Pupil Personnel and district office personnel and attends meetings with the other pupil personnel coordinators and the county staff. In addition, she is responsible for coordination of Special Education, the Human Relations Program and the Drug Abuse Program with the other pupil personnel programs.

A bi-annual newsletter concerning pupil personnel actions is developed by the district staff and sent to each Northwest District school.

DESCRIPTION OF PLANNED PROGRAM IMPROVEMENTS/CHANGES

No major changes in pupil personnel services program are planned at this time, however strengthening and improvement of services are being planned in each area.

One of the psychologists will spend part of his time in teaching the administration of ITPA, a testing instrument, to teachers and a workshop is being considered for selected elementary teachers in the area of guidance.

At present the guidance specialist, two psychologists, a full-time secretary and half of one secretary's time, and five of the visiting teachers work out of the North Center Office of the Northwest District. The other pupil personnel workers work out of the South Center Office of the main office. Some changes in housing and a reassignment of schools may take place next year.

Working with small groups of students is to be emphasized for both visiting teachers and guidance personnel and demonstration of techniques will be offered to these persons.

IDENTIFICATION OF OBJECTIVES AND REQUIREMENTS

Responsibility Center Name: Northwest District	Code Number: 9521	Program Name: Pupil Personnel Services	Code Number: 7150

Objective	Activities	Indicators	Personnel Requirements					
			Code	* 2211.10	** 2214.50	*** 2214.40	**** 2215.00	
			No.	3	7	2	2	
1. To provide psychological services for those pupils referred to the school psychologist by principals and the special education coordinator.	School psychologist will evaluate pupils referred and make recommendations to school personnel and parents based on their findings through interviews and testing results. They will hold pre-referral conferences and follow-up conferences with persons as needed.	1. Average number of adequate psychological evaluations. (Desirable level of service - 20 evaluations per psychologist per month). 2. Average percentage of time spent in: a. psychological evaluations. b. conferences c. school and community resource contacts d. inservice programs (Desirable percentages - a. 50% b. 25% c. 5% d. 5%) 3. Average number of pupils assigned to special class placement per month after psychological evaluation. 4. Number of referrals pending evaluations after three months request date.		5%	5%	95%	50%	

* 2211.10 - Guidance Specialist, Visiting Teacher Coordinator, Pupil Personnel Coordinator
** 2214.50 - Visiting Teachers
*** 2214.40 - Psychologist
**** 2215.00 - Secretary

FORM 30B
Effective: July 1, 1971

692

IDENTIFICATION OF OBJECTIVES AND REQUIREMENTS (Continued)

Objective	Activities	Indicators	Personnel Requirements					
			Code	2211.10	2214.5	2214.40	2215.00	
			No.	3	7	2	2	
2. To provide visiting teacher services as liaison between home, school and community in reference to pupil attendance and welfare.	Cases will be referred concerning the general welfare and attendance of students to the visiting teacher by the principal. The visiting teacher will hold conferences with appropriate school personnel, then hold home conferences. In addition, conferences with related resource personnel may be held. Information useful to the school in effecting school adjustment of pupils will be submitted to the school. The visiting teacher will provide a written social history to accompany psychological evaluations. A record will be maintained of all contacts. Visiting teachers will see pupils on an individual basis and in groups as circumstances indicate.	1. Average number of home conferences per month. (Desirable level of service, 90 per visiting teacher). 2. Average number of social histories to accompany psychological referrals per month. (Desirable level of service, 10 per visiting teacher). 3. Number of pupils per month needing visiting teacher services not served. 4. Average number of student conferences per visiting teacher per month. 5. Number of follow up conferences with community agencies.		20%	90%	0	40%	

0220 275

IDENTIFICATION OF OBJECTIVES AND REQUIREMENTS

Responsibility Center Name: Northwest District	Code Number: 9521	Program Name: Pupil Personnel Services	Code Number: 7150

Objective	Activities	Indicators	Personnel Requirements					
			Code	2211.10	2214.5	2214.40	2215.00	
			No.	3	7	2	2	
3. To provide guidance services for all pupils, K-12, which will assist them in their personal social adjustment and in educational and vocational planning.	The guidance specialist, together with the elementary counselor and pupil personnel coordinator, will initiate in-service programs. An elementary guidance steering committee will plan activities to improve the quality of the elementary guidance program. The guidance specialist will interpret county policy and disseminate information to district personnel and serve as a liaison between community groups and schools. She will provide leadership in such activities as the Vocational Guidance Council, the tutorial program, and the elementary guidance institute.	1. Number of visits to elementary schools to assist in developing and evaluating the guidance program. (Desirable level of service, one visit to each school). 2. Average number of meetings with secondary guidance staffs as a consultant. (Desirable level of service, twice annually). 3. Average number of steering committee meetings for district-wide planning: a. vocational guidance b. elementary guidance institute c. special guidance program		37%	0	0	0	

FORM 30B

Effective: July 1, 1971

IDENTIFICATION OF OBJECTIVES AND REQUIREMENTS (Continued)

Objective	Activities	Indicators	Personnel Requirements					
			Code	2211.10	2214.5	2214.40	2215.00	
			No.	3	7	2	2	
4. To provide those other pupil personnel services which are required.	1. Investigation of all requests for transfers. 2. Assist in determining measures of providing for pupils on thirty day suspensions. 3. Preparation of a district dropout report. 4. Human relations program and drug abuse program will be coordinated as part of the services. 5. Spot mapping as needed for boundary changes will be conducted. 6. Investigation and implementation of parents' requests for particular cases. 7. Preparation of requests for funds for special services and materials. 8. Placement committee meeting between psychologist, pupil personnel coordinator and Special Education Coordinator. 9. Monthly staff meetings for interpreting of policy and inservice.	1. Number of requests for transfer and disposition. 2. Number of requests and dispositions for thirty day suspensions. 3. Number of disruptive incidents attributed to racial problems. 4. Number of pupils who drop out of school. 5. Number of parental requests for intervention.		35%	5%	5%	5%	

272

PROGRAM PLANS

Identification Section	Responsibility Center Name	Code Number	Program Name	Code Number	Prepared by	Reviewed by	Date
	NORTHWEST DISTRICT	9521	MANAGEMENT	7750	R. Roberts		3/31/71

SUMMARY REVIEW OF CURRENT YEAR OPERATIONS

This year was fully occupied by numerous special, routine and new operations involving two senior high schools, six junior high schools, 26 elementary schools, two special schools, one reading center and one curriculum center.

There was a reorganization of the district administrative structure (K-12 and the Curriculum Center). An extensive Human Relations Program was developed, support services given to special problems created by court order and steps were taken to implement the Quinmester Program.

Management obviously devoted considerable time to staff meetings and district meetings with secondary and elementary principals. Many local school visits were made during the year.

Administrative Cabinet Meetings, School Board Meetings, and a Town Hall Meeting required regular attendance as did many meetings involving curriculum. Professional meetings and conventions on the local, state and national levels were attended. There were special meetings to attend involving civic, PTA, and community groups. Much time was given to individual conferences involving parents, staff members, teachers and community leaders and to the interviewing and placement of personnel.

Support organizations such as budget, security and plant planning required periodic attendance. Heading the public school division of the United Fund was an extra curricular activity, as was attendance at local school functions such as athletic and music events.

One is not to forget the enormous amount of operational time spent during the year with routine office work which required preparation and review of numerous reports and agendas, the making of critical decisions, dictation and general correspondence.

The reorganization of the district office at the administrative level was significant. Instead of two directors being responsible for the entire district at specific levels, each is responsible for all grade levels (K-12) for half a district. This we feel, allows for better communication between administration and the local schools.

Another significant highlight is the Curriculum Center which was established as a sub-district office. This has separated curriculum from administration which we feel is desirable.

A third outstanding achievement concerns the Human Relations area. An intensive orientation program was conducted involving all district schools with planned meetings and conferences. An outside consultant was obtained to coordinate the overall program. Serious school disruptions caused noted problems which had to be met. These special problems required close work with the principals, important decisions and much community involvement.

278
273

DESCRIPTION OF PLANNED PROGRAM IMPROVEMENTS/CHANGES
We innovated a K-12 administrative organization this year in our district and feel that it expedites and provides for closer communication. We plan to further refine this organization to improve its operation. A separate Curriculum Center was established this year. It has proved successful inasmuch as it has tended to separate the functions of curriculum and administration. We plan to continue with this type of organization and further refine it. A change in the Junior High Opportunity Center is envisioned. Most aspects of the program are progressing satisfactorily. However, it is our feeling that there should be a change in emphasis from concentrated student production to a more individualized program involving wider student activities and broader experiences. With our Human Relations Program, we believe that a meaningful beginning has been made. It is planned, however, to broaden the scope of this program, actively involve more participants and improve the overall articulation. The Pilot House Program serves three districts, and presently is undergoing an evaluation by the County Evaluation Team. We plan to function as usual until the findings of the committee are released and studied. Our course of action depends upon these outcomes.

B22 274 62

IDENTIFICATION OF OBJECTIVES AND REQUIREMENTS

Responsibility Center Name:	Code Number:	Program Name:	Code Number:
NORTHWEST DISTRICT	9521	MANAGEMENT	7750

Objective	Activities	Indicators	Personnel Requirements					
			Code	2112.00	2211.00	2115.00		
			No.	1	2	3		
1. To further strengthen the effectiveness of the K-12 administrative and organizational structure.	1. Regular meetings with principals. 2. Meetings with school principals and other staff members. 3. Visiting individual schools to observe and discuss operation with building principal. 4. Conducting feeder school articulation activities K-12.	1. Number of district-wide principals' meetings. 2. Number of sub-district principals' meetings. 3. Number of meetings with individual principals. 4. Number of meetings with school faculties. 5. Number of articulation meetings.		35%	50%	30%		

280

2275

FORM 30B

Effective: July 1, 1971

IDENTIFICATION OF OBJECTIVES AND REQUIREMENTS (Continued)

Objective	Activities	Indicators	Personnel Requirements					
			Code	2112.00	2211.00	2115.00		
			No.	1	2	3		
2. To facilitate the smooth and effective opening and continued operation of the three new schools.	1. Completing the selection and assignment of personnel. 2. Coordinating efforts of architects and builders in fulfilling obligations of the construction contract. 3. Selecting, procuring and ensuing proper delivery and placement of supplies. 4. Coordinating the correction of building deficiencies and minor architecture changes.	1. Number of applications screened for administrative positions. 2. Number of conferences with architect and builders. 3. Number of meetings and contacts with outside vendors and Department of Stores and Distribution 4. Number of contacts with architects or builders to correct and/or alter construction deficiencies that principal has not been able to have corrected.		10%	10%	5%		

IDENTIFICATION OF OBJECTIVES AND REQUIREMENTS

Responsibility Center Name:	Code Number:	Program Name:	Code Number:
NORTHWEST DISTRICT	9521	MANAGEMENT	7750

Objective	Activities	Indicators	Personnel Requirements					
			Code	2112.00	2211.00	2115.00		
			No.	1	2	3		
3. To further improve community-school relations.	1. Conferences with principals to assess the effectiveness of the school sponsored parent organization. 2. Conferences with secondary school principals to encourage more effective use of their multi-ethnic/ racial committees. 3. Conferences with principals in encouraging effective involvement of pupils, parents and patrons in the total school program. 4. The establishment of a speakers' bureau consisting of district and school personnel for the purpose of providing speakers for civic and community organizations. 5. Telephone and personal conferences with parents in the attempt to resolve home-school conflicts.	1. Number of conferences with principals in assessing effectiveness of the parent organization, school committees and parent involvement in the school program. 2. Number of speakers supplied to civic and community organizations through the speakers' bureau. 3. Number of telephone and personal conferences with concerned parents.		20%	20%	15%		

282

2212